TOURISM SASKATCHEWAN

BUSINESS & STRATEGIC MARKETING PLAN

2000 | 2003

BUILDING TOMORROW TOGETHER

FROM MANY PEOPLES STRENGTH

101-00102/

TOURISM IN SASKATCHEWAN

VISION

Tourism will be a vital, growing and sustainable economic sector.

VALUES OF TOURISM SASKATCHEWAN

- We believe in providing leadership through excellence in marketing and developing Saskatchewan's tourism potential.
- We believe in the power of teamwork, while respecting individual differences.
- We believe in conducting ourselves responsibly and with integrity in all endeavors.
- We believe in accountability, loyalty and commitment to our partners, our members and ourselves.
- We believe in responding creatively to member needs and business opportunities.
- We believe in contributing to the social, environmental and economic well-being of our province.
- We believe that the wisdom of Elders can provide us with guidance in the appreciation of our natural heritage.
- We believe in adapting enthusiastically to future challenges and opportunities.

EMPOWERMENT

Tourism Saskatchewan strives to empower its staff by providing an environment that enables them to meet or exceed stakeholder expectations.

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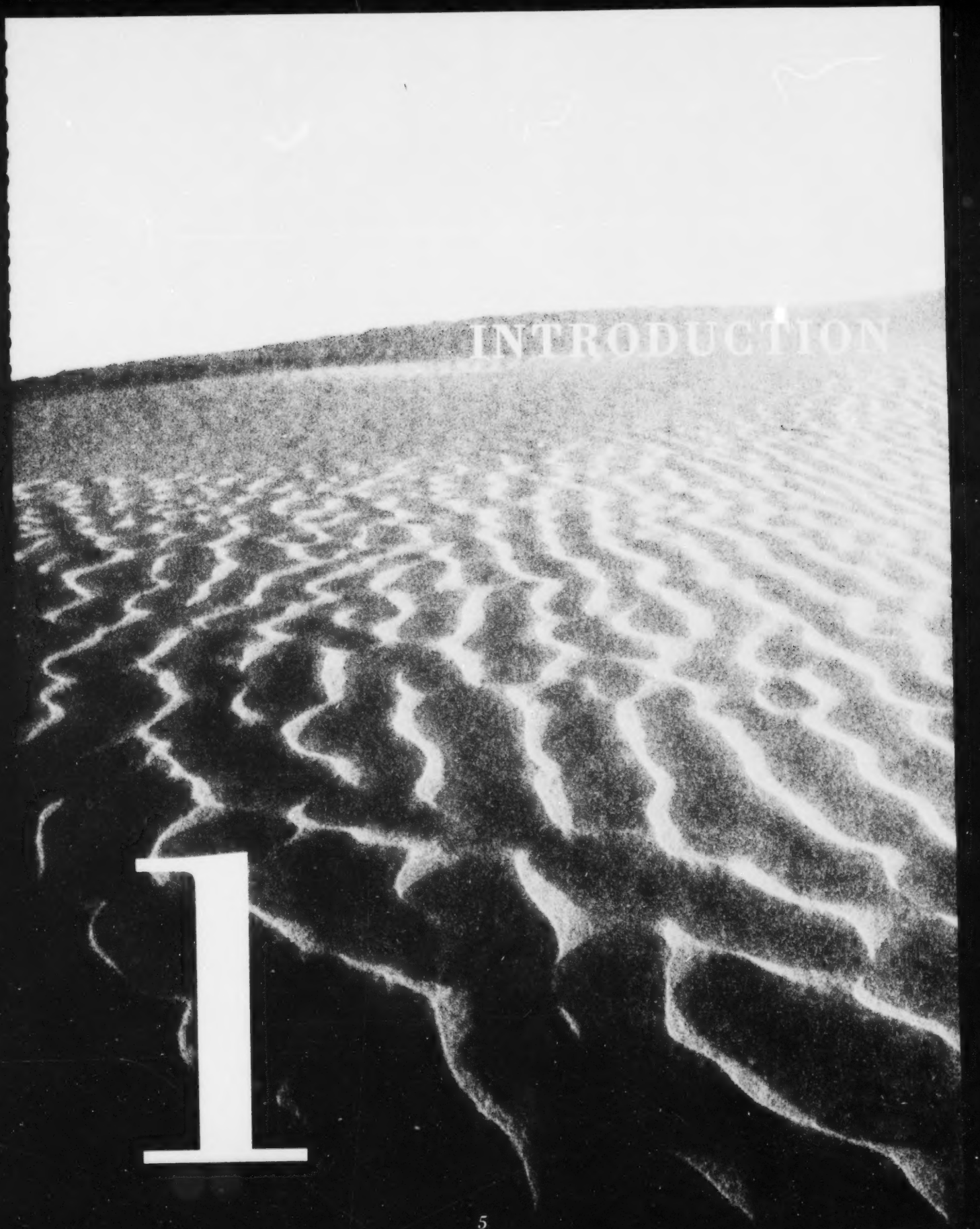


1 INTRODUCTION

INTRODUCTION

History of Tourism Saskatchewan

Tourism is the world's top industry in terms of overall contribution to the international economy. In Saskatchewan, tourism generated more than $1.16 billion in overall traveller expenditures in 1999, and earned $424 million from out-of-province travellers, and continues to be Saskatchewan's fastest growing economic sector and fourth largest export industry. In 1997, the number of tourism-specific jobs in the province grew by 10 per cent, outpacing the 2.8 per cent rate of growth in all other industries. About 42,000, or one in 11, Saskatchewan workers are employed in tourism-related jobs.

To keep pace with tourism's rapid growth and increasing importance to Saskatchewan's economy, job market and image, a dynamic, industry-driven organization was formed to strengthen Saskatchewan's position in the world tourism marketplace. That organization is Tourism Saskatchewan.

The Government of Saskatchewan's Partnership for Renewal strategy, released in November 1992, recognized tourism as one of the province's six key economic sectors. To consider how best to foster this rich resource, the provincial government set up the Minister's Task Force on Tourism Partnerships. The Task Force recommendations led to the establishment of the Saskatchewan Tourism Authority in October 1994, transferring responsibility for tourism from the government's Economic Development department to the new Authority.

In May 1996, in response to the continued growth and increasing profile of Saskatchewan's tourism industry, the province's three key tourism organizations – the Saskatchewan Tourism Authority, the Tourism Industry Association of Saskatchewan (TIASK) and the Saskatchewan Tourism Education Council (STEC) – merged to become Tourism Saskatchewan.

This merger, combined with the transfer of the product development mandate from the provincial government, created the most comprehensive, industry/government tourism partnership – the first of its kind – in Canada. Today, Tourism Saskatchewan offers a comprehensive range of programs and services to help its partners develop and promote the province's tourism industry.

Tourism Saskatchewan is financed jointly by industry and government. The government's annual investment is supplemented by revenues received from industry for co-operative marketing, commercial activities and various services. Tourism Saskatchewan earns and retains revenue from year to year.

Tourism Saskatchewan represents more than 3,500 tourism stakeholders across the province. Its 15-person Board of Directors consists of 10 representatives chosen by designated industry organizations, three members elected at large from approved organizations, and two members appointed by the provincial government. Organizations designated to select board members currently include the Federation of Saskatchewan Indian Nations; heritage/arts/multicultural organizations; the Hotels Association of Saskatchewan; the Metis Nation of Saskatchewan; the Saskatchewan Outfitters Association; Tourism Regina; Tourism Saskatoon; and the five rural tourism regions.

Other organizations able to elect members include individual tourism businesses; associations engaged in activities that directly impact or support tourism development in the province; tourism and convention bureaus; regional and destination area tourism associations; tourism corridor associations; and departments and agencies, at all levels of government, whose policies affect tourism.

The Board of Directors provides broad policy direction to Tourism Saskatchewan, while operations are managed by the President/Chief Executive Officer.

In the fall of 1996, Tourism Saskatchewan established the President's Advisory Councils on Marketing, Education and Training, and Membership. These three councils, composed of industry representatives, report to Tourism Saskatchewan's President/CEO and provide input into the objectives, plans and strategies of the organization. In addition, three committees on ecotourism, agritourism and cultural tourism offer direction in these significant product areas.

Tourism Saskatchewan is one of the many groups working with the Citizen's Advisory Council on Anniversaries in developing events and celebrations for the millennium and our province's centennial in 2005. Additionally, the organization is partnering with SaskSport on a Bid Saskatchewan initiative designed to

attract and host major sport, culture and recreation events in Saskatchewan.

Starting in May 1997, Tourism Saskatchewan, in partnership with its members, undertook a major review of the province's tourism regions. The ultimate goal of the review was to develop an industry-based organizational structure, sensitive to regional needs, which would most effectively support tourism product development and marketing. The new, industry-approved structure that took effect in October 1998, involved a move to seven administrative regions – north, west central, east central, southwest, southeast, Regina and Saskatoon – from the previous 11, with the provision that within three years Regina and Saskatoon will join the southeast and west central regions, respectively.

Additionally, the new regional structure saw the establishment of a Peer Review Committee to administer marketing funds flowing to the regions and to review operational funding. By spring 1999, the five new rural regions were all incorporated and had hired a total of 11 full-time staff.

This new regional framework, supported by the co-operation and partnership of all those involved in the industry, will take tourism in Saskatchewan to the next level in its development, enabling operators to satisfy visitor needs and enjoy increased success.

Together, Tourism Saskatchewan and its partners are moving towards a bright and promising future for Saskatchewan's tourism industry.

*BOARD OF DIRECTORS**

Director	*Appointed By*
Wayne Fennig, Chair	Elected at large
Debbie Greening, Vice Chair	Elected at large
Gary Atimoyoo	Federation of Saskatchewan Indian Nations
Kimberly Beaudry	Tourism Regina
Wayne Elliott	Parkland Regional Tourism Associations
Garth Harris	Forest Regional Tourism Associations
Peter Kingsmill	Elected at large
Darryl McCallum	Metis Nation of Saskatchewan
Orval McComb	Hotels Association of Saskatchewan
Jeremy Morgan	Heritage/Arts/Multicultural
Larry Spannier	Government of Saskatchewan
Ray Vangen	Prairie Regional Tourism Associations
Carole Wakabayashi	Tourism Saskatoon
Ed White	Saskatchewan Outfitters Association

** On July 1, 2000*

CHAIRMAN'S MESSAGE

I'm pleased to introduce to you the *2000/2003 Business and Strategic Marketing Plan.* This plan provides a comprehensive overview of the many activities, projects and programs the Saskatchewan tourism industry will involve itself in over the next three years.

In addition to the immediate plans for the upcoming fiscal year, which are outlined in detail, some longer term goals and objectives are provided to give an indication of where we're headed over the next three years. Beyond that, Section 11 of this document provides a broader overview of our industry.

The business plan arises from the recommendations of Tourism Saskatchewan staff and the deliberations of the Board, but it also represents the thoughts and suggestions that the Board and staff have received from industry through various communications. The Board strives to provide the vision under which Tourism Saskatchewan operates, through its Ends Statements, creating the broad policy direction that guides the CEO and staff as they develop goals and objectives.

The many activities pursued by Tourism Saskatchewan and the tourism industry throughout each year would not be possible without the ongoing support of the provincial government. I would like to take this opportunity to thank the Honourable Janice MacKinnon, Minister Responsible for Tourism, as well as the staff of the Economic and Co-operative Development department for their involvement and encouragement.

I think this plan shows the commitment and strengths of the Tourism Saskatchewan team, developed as it was with the position of President and CEO unfilled. I thank the entire staff of the organization for their commitment in continuing to fulfill the goals and objectives of this past year, while working towards upcoming plans for the new fiscal year, October 1, 2000 to September 30, 2001.

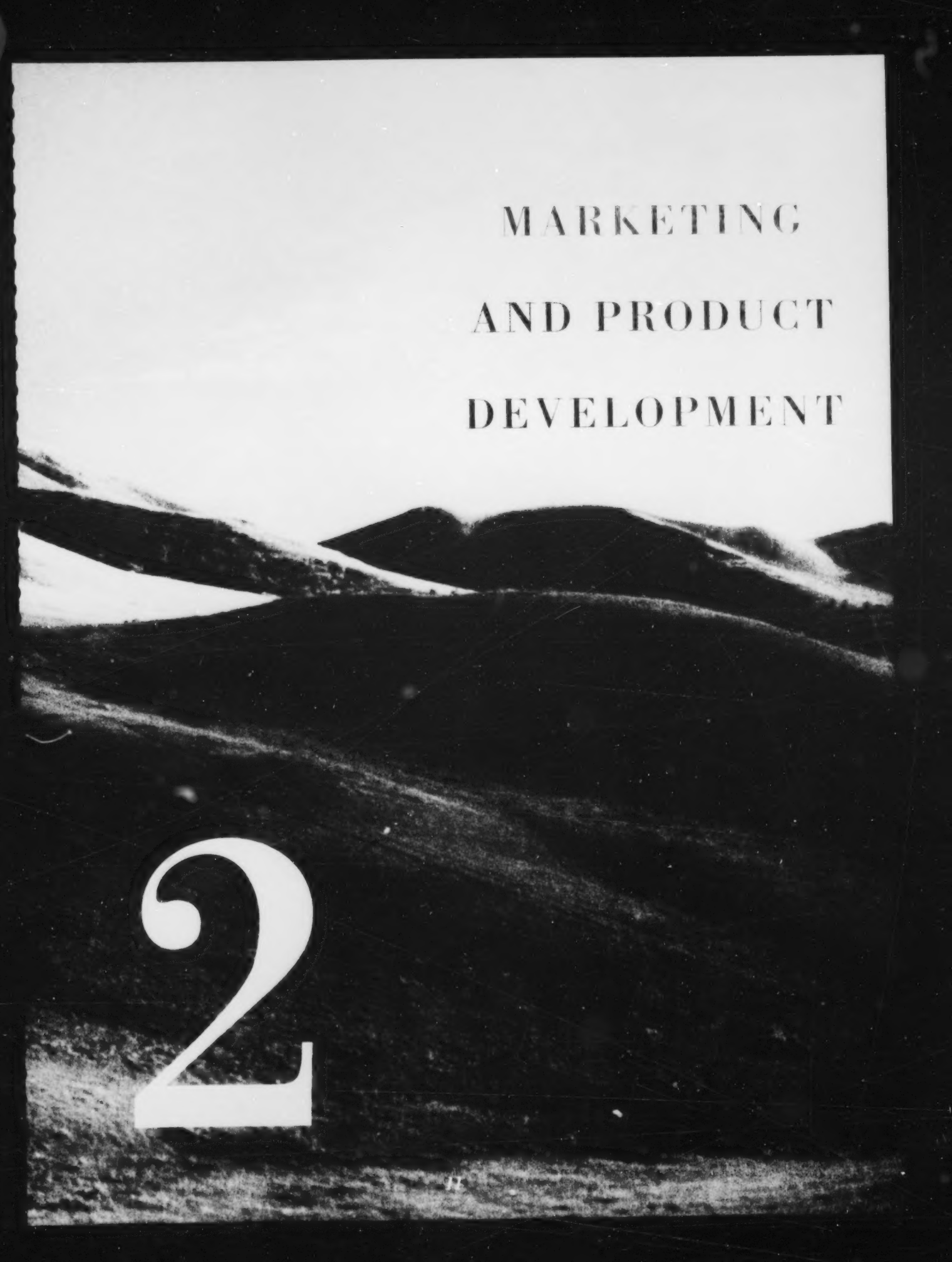
The search for a new CEO has been completed, and the board was happy to announce in July 2000 the selection of Roy Anderson as the new President and Chief Executive Officer of Tourism Saskatchewan, effective October 1, 2000. I know that Roy will appreciate and benefit from the experience, dedication and knowledge of the staff at Tourism Saskatchewan. I would like to extend a special thank you to Stephen Pearce, who has handled the CEO responsibilities in an acting capacity since November 1999, while also continuing his work as Vice President of Marketing and Product Development.

One of the outstanding achievements of the past year has been the incredible interest and activity generated by the Tourism Saskatchewan web site. In the first six months of 2000, Internet inquiries totalled 399,185, an increase of 143 per cent over the same time period in 1999. This great success story directly impacts tourism operators linked to the site, with qualified leads and the kind of swift access that we could have only dreamed about not long ago. It boosts the profile of our province, and entire tourism industry, at a global level. The launch of the on-line events calendar at the Spring General Meeting in April added to the comprehensiveness of our web presence.

We have moved even further along in the development and growth of the tourism regions, formed in October 1998. Considering the degree of change that was introduced, with nine rural regions amalgamating into five, much has been accomplished and the regional structure is proving sound and beneficial.

While Tourism Saskatchewan has experienced some of the most significant change of its young life over the past year, the organization has held its ground, proving the inherent strength of the model on which it was built. The tourism industry is thriving, and the new millennium presents much for us to look forward to.

Wayne Fennig



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MARKETING AND PRODUCT DEVELOPMENT

II. MARKETING AND PRODUCT DEVELOPMENT

1. Marketing Background

"A product can be copied by a competitor; a brand is unique. A product can be quickly outdated; a successful brand is timeless."

S. King, WPP Group, London

"Your commercials, aired during (Labatt Brier 2000) curling, were terrific! I am very familiar with Saskatchewan and visit at least 6-12 times a year and the ads were "uppers" for me!"
- N. McDowell, Headingney, MB

A good brand is not simply a good product. A good brand adds value to the product by conveying a host of associations that differentiate the product in meaningful ways from other products in the same category. The logo, tagline and icons of a product are simply a type of visual shorthand that alerts the consumer to the inherent promise in the brand.

What does it mean to take a vacation in Saskatchewan? Is there a core essence to a Saskatchewan experience - whether it be for camping, city vacations or fishing - that can be distilled and communicated to a diverse customer base? Is there such a thing as a Saskatchewan brand?

The answer is "yes", and one of the key objectives of Tourism Saskatchewan for the coming year is to explicitly describe the brand, and the shorthand that will be used to convey a quality Saskatchewan experience. Watch for a new look in Tourism Saskatchewan's marketing programs for 2001, and a stronger integration of creative at the provincial and regional levels.

Other areas of emphasis for the coming year continue to be packaging, database marketing and the Internet.

• Packaging - The development of market-ready packages that can be communicated and sold individually or to the travel trade continues to be a priority. Areas of emphasis include ecotourism, agricultural experiences, winter vacations, and Aboriginal and cultural vacations. Venues such as the agricultural tourism workshop and the cultural tourism symposium will be used as opportunities to broaden the level of dialogue between the various stakeholders. Tourism regions will be actively engaged to develop and support packaging efforts throughout the province.

• Database marketing – Tourism Saskatchewan has committed to testing and improving its proficiency with database marketing as a means of developing enduring relationships and increasing penetration of qualified markets. Areas that will be tested during the coming year include Internet respondents who provide e-mail and address information, a database of Saskatchewan former residents who may be interested in ongoing information, and visitors traveling to North Dakota as a result of the marketing efforts of the State who may be encouraged to include Saskatchewan in their vacation.

• Internet – The Travel Industry Association of America estimates that the number of U.S. travelers who used the Internet for travel planning increased from 3.1 million to 11.7 million from the period of 1996 to 1998. Half of all on-line travelers consulted the Internet to get information on destinations or to check prices and schedules. Tourism Saskatchewan has committed to expanding its Internet presence with an aggressive web based strategy that will augment conventional methods of marketing.

The following pages outline the strategic directions and initiatives in each of Saskatchewan's key markets.

2. Tourism Sector Performance

In 1999 travellers spent an estimated $1.16 billion in Saskatchewan. Saskatchewan residents accounted for 43% of that total. Saskatchewan residents spent about $500 million on trips in the province and an additional $220 million on goods and services in Saskatchewan prior to travelling out-of-province. The remaining revenues were derived from other Canadians (32%), United States residents (21%) and overseas visitors (4%). In 1999, preliminary estimates indicate a slight drop in total full year visits from Canada and the United States. The decreases in trips occurred in the shoulder and winter seasons while key summer travel appears to have shown increased visitation from all markets. The full year drop in visits was also offset by increases in expenditures showing that Saskatchewan markets are providing a higher yield per visit.

Expenditures in Saskatchewan by those making trips of one or more nights accounted for an estimated $745 million, an increase of 4.7% over 1998 and 18.8% over 1996.

From 1996 to 1999, growth in tourism exports (expenditures in Saskatchewan by non-resident visitors) significantly outpaced growth in Saskatchewan resident expenditures. As a consequence, revenues from overnight or longer visitors from outside Saskatchewan grew to 57% of total overnight revenues (up from 53% in 1996).

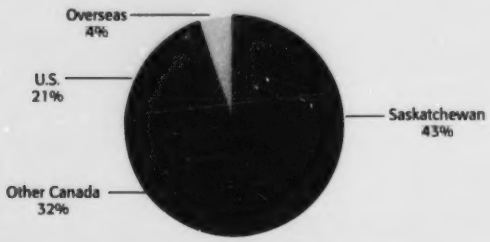
Chart 1

Overnight or Longer Trips in Saskatchewan 1996, 1998[1] and 1999[2]

Origin	Trips			Change %	Total $M			Change %	Avg. $/Trip		
	1996	1998	1999	96-99	1996	1998	1999	96-99	1996	1998	1999
Sask	3,308,000	3,208,000	3,031,000	-3.0%	$297	$303	$320	+2%	$90	$100	$106
Other Cda.	1,185,000	1,246,000	1,351,000	+5.1%	$207	$248	$238	+22.7%	$175	$204	$176
U.S.	188,000	222,000	200,000	+16.3%	$104	$132	$156	+54.5%	$550	$597	$780
Overseas	57,000	53,300	61,800	-7.0%	$19	$21	$30	+10.5%	$337	$396	$485

1 Total expenditures include $8 million for resident overnight trips under 80 km, and $5 million for First Nations residents living on reserves which are not included in Statistics Canada estimates. Revenues also include $50 million in 1998 and $60 million in 1999 for United States resident expenditures in Saskatchewan in order to capture expenditures made by visitors to northern and other outfitting lodges not adequately captured by Statistics Canada.
2 1999 Canadian travel data should be used with caution due to a loss of survey records in the final four to five months of 1999. Statistics Canada has not made any adjustment for these lost records.

Tourism Expenditures



While Saskatchewan residents travelling in Saskatchewan accounted for 65% of total overnight or longer trips in the province, they generated only 43% of total overnight or longer expenditures.

The primary purpose of visitor travel to Saskatchewan is different for Canadians and international markets. While visiting friends and relatives motivates the majority of Canadians, U.S. and overseas visitors are most likely to be here for specific recreational activities.

Chart 2

Primary Purpose of Overnight or Longer Trips 1998

Origin	Pleasure	Visiting	Business/Convention	Personal
Sask	33%	45%	11%	11%
Other Cda.	25%	52%	14%	9%
U.S.	52%	23%	11%	14%
Overseas	53%	28%	17%	2%

The more activity a visitor participates in, the longer he or she is likely to stay - generating more revenues for Saskatchewan's industry. Saskatchewan residents take frequent trips, and have one of the highest likelihoods of any residents in Canada of travelling within their own province. These trips, however, are short and don't result in high levels of activity or expenditures. Visitors from outside Saskatchewan's borders take the longest trips and participate in more tourist activities during their visits.

Chart 3

Average Length of Stay of Overnight or Longer Travellers in Saskatchewan

Origin	Average Stay		
	1996	1998	% Change
Saskatchewan	2.5	2.6	+3%
Other Canada *(destination SK)*	4.4	5.1	+17%
Other Canada *(passthrough)*	1.1	2.7	+143%
United States	3.5	3.52	+0.6%
Overseas	4.2	5.2	+23.8%

Preliminary estimates from 1999 indicate further increases in length of stay of our international visitors with U.S. residents increasing to 3.64 nights and overseas visitors to 5.37 nights.

Visitors from distant markets are very likely to be visiting more than one province or state. This suggests an opportunity for increased partnering and cooperation with other provinces and states in order to offer potential visitors a varied, quality tourism product and to increase the opportunities to reach these markets.

3. Marketing and Advertising Results Overview

In 1999, Tourism Saskatchewan received 453,191 tourism inquiries, an increase of 67% over 1998. Changes in consumer attitudes, reduced advertising budgets and direct contact to Saskatchewan operators partnering in direct mail campaigns led to a decrease in traditional methods of inquiry (phone, reply card and mail). This decrease in traditional inquiries was more than offset by a 257% increase in Internet inquiries.

Consumers are increasingly using the Internet as a travel information and planning tool with over 60% (some estimates are as high as 85%) of North American travellers indicating they use the Internet as a primary source of information when planning trips.

In 1999, Tourism Saskatchewan conducted a survey (via the Internet) of inquirers who had provided their e-mail address. Survey results indicated that 62% of Canadian web inquirers and 33% of United States residents who visited the Tourism Saskatchewan web site and requested information converted to a visit to the province. These high conversion rates are even greater than those for traditional media, and show the value of innovative web marketing.

By the end of May 2000, Tourism Saskatchewan had received over 390,000 inquiries. Over 85,000 were generated directly by a 2000 advertisement or marketplace. Advertising and marketplace activity will also indirectly influence later web visits. These inquiry numbers do not include those who contact a Saskatchewan operator or a tourism region directly as a result of an ad in one of the Tourism Saskatchewan campaigns.

In 2000, in addition to traditional advertising, Tourism Saskatchewan tested a variety of subject specific banner advertisements on two outdoor Internet sites and two search engines. These banner ads appeared based upon the subject of interest entered by the web browser. Depending on the ad, between 1.5% and 10% of those exposed to the ad clicked through to visit the Tourism Saskatchewan web site. This level of interest is comparable to a good direct mail campaign and far higher than interest generated through traditional media such as magazine or television.

Results to the end of May have been quite positive – over 24,000 visited the Tourism Saskatchewan web site as a result of a banner. These web site visitors were very interested in Saskatchewan tourism operators – they linked through at an average rate of 1.7 times per person to over 40,875 operator sites on TourNet. They also looked at an average of 2.4 specific product categories per person - with over 57,867 visits to the product section of the Tourism Saskatchewan site. These are very solid leads for Saskatchewan operators allowing those on TourNet to reach new markets at a very low cost. In 2001 Tourism Saskatchewan will be building on this success with expanded Internet advertising and improvements to the web site.

Surveys of inquirers and analysis of marketplace results indicate that those who responded to our promotions by visiting Saskatchewan spend $37 for every $1 Tourism Saskatchewan invests in advertising and $36 for every $1 invested in a trade or consumer marketplace.

4. Goal

Tourism is currently a $1.16 billion industry in Saskatchewan. The goal of Tourism Saskatchewan is to increase visitor expenditures in Saskatchewan to $2.0 billion by the year 2010.

Measurement of visitor expenditures will be by the Canadian Travel Survey and the International Travel Survey, both of which are also the indices used by the Canadian Tourism Commission.

Successful attainment of the goal is predicated on a number of assumptions:

- The exchange rate differential between the Canadian and U.S. currency remains relatively constant
- The political environment remains stable
- The Canadian Tourism Commission continues to focus on strengthening the Canada brand in U.S. and overseas markets
- Inflation in both Canada and the U.S. remains low
- The number of available packages from industry operators continues to increase
- The level of investment in marketing is sustained

5. Marketing and Sales Overview

Tourism Saskatchewan recognizes that effective penetration of the marketplace will depend upon an integrated, sustained effort.

Target markets are developed through an effective combination of advertising, direct sales and unpaid media support. The emphasis is on measurable results and communicating to the tourism industry on an ongoing basis. Sensitivity to changes in target markets will allow tactical changes to the strategy to maximize opportunities for attracting long-term business.

An improved account management system is being implemented for travel trade and media accounts, allowing consultants to develop stronger relationships with travel influencers, and allowing industry partners to quickly assess opportunities for their products.

Trade and consumer shows will be complemented with direct sales calls, workshops and familiarization tours. Contact with AAA offices in key U.S. markets will be a priority.

Specific initiatives to support industry partnerships will include the following activities:

- Continue to expand Internet presence to augment all campaigns, build relationships with qualified consumers, and increase product-specific inquiries

- Emphasis on vertical market niches across appropriate geographic markets
- Emphasis on co-op opportunities with industry in key markets
- Provide fulfillment for partner inquiries that are market-specific
- Encourage the tourism regions and the private sector to take a focused approach to market development
- Encourage industry participation in familiarization tour sponsorship and itinerary development
- Generate a minimum of $700,000 in media coverage through unpaid media and familiarization tour initiatives

Regular performance indices will be tracked and shared with the industry on an ongoing basis, including the following:

- Qualified leads received by staff at Tourism Saskatchewan
- Qualified leads which have resulted in confirmed business to Saskatchewan
- Inquiries received by mail and on the toll-free 1-800 and 1-877 lines by Tourism Saskatchewan counsellors, and via the Internet
- Inquiries received at Tourism Saskatchewan visitor reception centers
- Familiarization tours and participants
- Media tours and coverage

Improving direct sales efforts in all markets is related to Saskatchewan's ability to put commissionable, market-ready product into appropriate distribution channels.

6. Marketing Objectives

For each geographic market an annual objective has been established based upon visitor expenditures expected for the period from 1999 to 2005. Achieving these targets will position Saskatchewan well on its way to realizing an economic value for tourism of $2 billion by the year 2010.

Overall annual objectives for each geographic market for the period 1999 to 2005 are as follows:

- 3% increase in visitor expenditures from Saskatchewan residents (1999 saw about 1.3% increase over 1998)
- 6% increase in visitor expenditures from other Canadian residents (expenditures to July 1999 increased 20.3% but annual expenditures may have decreased by 4.7%)
- 8% increase in visitor expenditures from the U.S. market (1999 saw an increase of 18% over 1998)
- 3% increase in visitor expenditures from the overseas markets of Southeast Asia and Western Europe (1999 saw an increase of 43% over 1998)

Within Canada, primary emphasis is on Alberta and Manitoba. Ontario and British Columbia are secondary markets. Preliminary analysis indicates that both visits and expenditures in the summer of 1999 showed continued increases over the previous record summer. However, data indicates that Saskatchewan saw decreased visits and expenditures in all other parts of 1999 compared to 1998. Please note that due to loss of records in the last four to five months of 1999 Statistics Canada estimates for 1999 should be used with caution.

The short haul U.S. market is composed of the nearby states of North Dakota, South Dakota, Montana and Minnesota. The long haul market is composed of the states of California, Colorado, Florida, Illinois, Indiana, Iowa, Kansas, Michigan, Missouri, Ohio, Oregon, Texas, Washington, and Wisconsin.

On an inquiry basis, 1999 saw higher yields and penetration in the western Great Lake States, including Michigan, Illinois, Ohio and Wisconsin. Texas and California continue to be high performers. There was a growth in share in the short haul markets of North Dakota, Montana and Minnesota.

On an expenditure basis, preliminary results from 1999 indicate that there was an overall decrease in total overnight or longer trips from the United States and from certain key states. Revenues, however, continued to increase overall, with increases from each of California, Minnesota, Colorado, Missouri, Wisconsin and Indiana.

Trips by residents of North Dakota and Montana increased in 1999, but their average per trip expenditures decreased. This decrease highlights the importance of the market shift to more distant, targetted, higher yield customers.

The strategic direction will be to influence interested consumers who match Saskatchewan's product-lines throughout all of its geographic markets. This will be done through special interest media, through co-operative promotions with industry partners, through focused public relations, and through travel-trade activities.

Tourism Saskatchewan will continue to maximize its involvement in the area of co-operative activities, and will seek out opportunities to work with:

- tourism regions, destination areas, corridors and associations (market specific)
- Tourism Alliance for Western and Northern Canada (TAWNC)
- Manitoba and North Dakota in the areas of outdoor adventure and agricultural tourism
- Canadian Tourism Commission (CTC)

Co-op ventures with industry partners will help lever scarce resources as well as help meet Tourism Saskatchewan's marketing objectives.

7. Marketing Initiatives

Tourism Saskatchewan's initiatives are described by geographic and vertical markets. This includes trends/observations, trip purpose, strategies, creative direction, unpaid media, travel trade, promotions and media plan.

Marketing campaigns are supported through a combination of advertising, direct sales, in-kind support from tourism partners, corporate partnerships, and media publicity. Allocation by market is as follows:

Chart 4

Budget Allocation

Canada	26%
United States	70%
Overseas	4%

CANADA

The Canadian Tourism Commission Strategic Plan (1999-2000) identified a number of domestic market segments that offer opportunities for Saskatchewan's tourism industry:

- *Aging boomers and mature* - the majority of travelling Canadians are from the baby boom generation (ages 32-51) and from the mature market segment (55+). Target markets are middle-aged (40-55) and mature/retired. With above average income and education, these are the growth markets for the next two decades.
- *Nature and authenticity* - increasing affinity for the great outdoors, nature and things both natural and authentic. Product availability and purchasing options are an issue.
- *Single women* – there are a growing number of mature, affluent, well-educated women who travel. Packages must be developed and marketed respecting their needs and concerns.
- *Empty nesters* – These are adults whose children have grown and left the home. Often affluent and well educated, they have more disposable income and usually more time to travel. They can also be encouraged to travel during non-peak periods.
- *Young adults* - younger boomers (32-40) present market opportunities for outdoor adventure and winter experiences.
- *Visiting friends and relatives* - still the overriding reason that residents travel in Canada. There is still too little awareness of the wide range of travel experiences in Canada. There is also a lack of customer responsive, value added packages.

Non-resident visitor travel characteristics in Saskatchewan are described in the charts below.

Chart 5

Non-Resident Canadian Visitors' Activity Participation (all overnight or longer trips)

Visit friends	71%
Visit relatives	66%
Participate in sport/outdoor activity	30%
Shop	28%
Sightsee	27%
Walk or hike	15%
Swim	14%
Visit a bar/nightclub	9%
Visit a park	13%
Visit a museum	10%
Golf	6%
Visit a historic site	11%
Other water-based activity	6%
Attend sports event	11%
Attend festival or fair	6%
Casino	6%

Visiting friends and relatives continues to be the primary reason for non-resident visitation to the province. Not surprisingly, home stays are also the primary type of accommodation. Hotel, motel and resort stays account for 24% of overnight trips.

Chart 6

Non-Resident Canadian Accommodation Use By Type
(percentage of nights for all overnight trips)

Home of friends or relatives	62%
Hotel	13%
Camp or trailer park	8%
Motel	7%
Commercial Cottage Resort	4%
Other commercial roofed	1%
Private cottage	3%
Other/not stated	3%

The majority of non-resident visits are during the summer months (54%), with 15% visitation in each of the two shoulder seasons.

Chart 7

Non-Resident Canadians' Overnight or Longer Trips By Quarter

First Quarter *(January-March)*	16%
Second Quarter *(April-June)*	15%
Third Quarter *(July-September)*	54%
Fourth Quarter *(October-December)*	15%

SASKATCHEWAN

Trends

Saskatchewan residents exhibit the following travel characteristics:

- Highly likely to take short-term getaways
- High propensity to travel in Saskatchewan
- Saskatchewan residents have a high tendency to travel to other parts of Canada, accounting for 8% of all overnight or longer trips made by Canadians to other provinces
- Slow or limited likelihood of growth in trips means that increased revenues from the resident market must come from increasing the level of activity participation and the length of stay
- The main reason for residents travelling in province is to visit friends or relatives (45% of trips), followed by pleasure or vacation (33% of overnight trips)
- Over half of Saskatchewan residents take at least one pleasure or vacation trip in the province each year, usually in the summer
- Parks, lakes and camping are the most popular motivators for resident vacation trips

Trip Purpose

- Visiting friends and relatives
- Touring
- Outdoor experiences (e.g. parks, camping, resorts)
- Historic sites
- Urban experiences (24% of travellers in spring/fall and 35% of travellers in winter would choose an urban location for a getaway or longer trip)
- Fishing and hunting
- Golf
- Shopping
- Winter experiences
- Going to lakes in the summer - both north (33% of travellers) and south (30% of travellers)
- Business (meeting and convention)

Further details on resident travel activity are provided in the following charts:

Chart 8

Saskatchewan Travellers' Activity Participation
(all overnight or longer trips)

Visiting friends	61%
Visiting relatives	66%
Participate in sport/outdoor activity	46%
Shop	27%
Sightsee	14%
Walk or hike	12%
Swim	12%
Visit a park	9%
Other water-based activity	7%
Fish	7%
Golf	7%
Attend sport event	6%
Bar/nightlife	7%
Other outdoor activity	7%

In conjunction with visiting friends and relatives as the primary travel motivator, overnight stays are also predominantly at the homes of friends and relatives. Hotels/motels/resorts account for 15% of overnight visits and campgrounds account for 14%.

Chart 9

Saskatchewan Residents' Accommodation Use By Type (% of total nights)

Home of friends or relatives	53%
Private cottage	13%
Hotel	9%
Camp or trailer park	14%
Commercial Cottage Resort	3%
Motel	3%
Other commercial roofed	<1%
Other/not stated	4%

The majority of overnight stays are during the summer months (35%), but the shoulder seasons are growing in importance (47% versus non-resident Canadian travel to Saskatchewan of 40%)

Chart 10

Saskatchewan Residents' Overnight or Longer Trips By Quarter

First Quarter *(January-March)*	18%
Second Quarter *(April-June)*	25%
Third Quarter *(July-September)*	36%
Fourth Quarter *(October-December)*	21%

Marketing Objective

• Tourism expenditures in 1999 attributable to Saskatchewan residents are estimated to be $729 million. The marketing objective for the year 2001 is to increase tourism expenditures from Saskatchewan residents by 3% (1999 expenditures were an estimated 1.3% higher than 1998).

Marketing Strategy

• Continue radio publicity to maximize resident exposure to tourism products and happenings
• With tourism regions, expand short-term "getaways" – including shoulder and winter seasons
• Secure corporate partnerships for joint marketing with tourism regions
• Continue to emphasize specific product offerings with partner support
• Encourage development of value-added packages
• Encourage partner efforts to track and report visitation
• In conjunction with the Marketing Advisory Council, support provincial marketing campaigns which are focused, provide a strategic context, and yield measurable results
• Continue to demonstrate the role and importance of tourism in the provincial economy
• Use Tourism Awareness Week to promote a sense of pride in Saskatchewan residents in the tremendous opportunities for vacationing in Saskatchewan

Creative Direction

Tourism Saskatchewan will encourage tourism regions to focus on awareness, pride of place and travel opportunities. Emphasis will not be on exploration but on "rediscovery." The introduction of new product opportunities will expand the resident's "sense of place." "There really is no better place for a vacation."

Unpaid Media

Unpaid media includes travel news releases, media on special tour, and other ongoing communication opportunities with the travel media.

• Distribute a series of press releases in support of national Tourism Awareness Week
• Distribute a "trends" report on a quarterly basis in conjunction with *Going Places*
• Continue a weekly "on-air" program which features a travel consultant sharing up-and-coming events and activities through one or more radio networks
• Encourage featured editorial in newspapers on a regular basis

Travel Trade

Travel trade's role, both domestically and abroad, is to develop, educate, and sell. Within the province, attention will be paid to the trade and the CAA to expand their knowledge of tour packages, vacation trips, and city packages.

Tourism Saskatchewan will continue to focus its efforts within the province toward improving the capability and effectiveness of the tourism regions, and will continue to provide leadership and support to regional associations, sector associations and corridors by supporting market planning and product development efforts.

Promotions

Regional partners will continue to be the lead for in-province consumer shows. Participation at Agribition and Farm Progress

will focus on developing pre/post vacation packages with the support of industry partners.

November	Agribition, Regina, SK	Consumer
June	Farm Progress, Regina, SK	Consumer

A comprehensive photo library is available to support the marketing efforts of industry partners and will be updated throughout 2000/2001.

ALBERTA

Trends

Alberta travellers to Saskatchewan exhibit the following travel characteristics:

- Albertans took 726,000 overnight or longer trips in Saskatchewan in 1998, an increase of 17% over 1996. While this level of increase appears to have been maintained in the summer of 1999 (perhaps as much as another 18% increase), other seasons appear to have seen a decrease in visitation in 1999 from 1998.
- Most likely to be visiting friends or relatives in Saskatchewan, but a growing number are interested in Saskatchewan vacation experiences
- Choose Saskatchewan because of lakes, parks and resorts
- Looking for alternatives to mountain resorts due to capacity problems during peak season
- Increased urbanization leading to a desire to escape
- High level of interest in outdoor experiences coupled with luxury
- Very high propensity to travel in Canada accounting for 19% of all overnight or longer trips taken by Canadians to other provinces
- Higher than average education and income; travel as couples or singles

Trip Purpose

- Visiting friends and relatives
- Outdoor experiences (e.g. parks, waterbased activities, camping)
- Touring
- Fishing
- Casinos
- Golf
- Business (meeting and convention)

Further detail on Alberta travel activity to Saskatchewan is provided in the following chart:

Chart 11

Alberta Pleasure Visitors' Most Popular Activities

Visit friends or relatives	63%
Sightsee	32%
Shop	25%
Visit a museum or gallery	12%
Visit a casino	12%
Walk/hike	26%
Swim	37%
Attend sports event	20%
Other water-based activity	22%
View birds/wildlife	18%
Fish	16%
Cycle	12%
Visit a national/provincial park	14%

Marketing Objective

- Tourism expenditures in 1999 attributable to Alberta are estimated to be $110 million. In 2001 the marketing objective is to increase expenditures 3% over 1999 levels.

Marketing Strategy

- Expand/maintain use of direct mail to qualified Alberta households
- Expand knowledge and use of Visitor Reception Centres at border crossings as resource centres to invite extended stays
- Organize Calgary Stampede marketplace in conjunction with industry partners
- Target key travel associations (e.g. CAA) through direct sales calls to increase member knowledge of Saskatchewan products
- Partner with the CTC in co-op newspaper inserts
- Participate in CTC Rediscover Canada Vacation program

Creative Direction

Creative for Alberta will expand upon the existing stereotype of Saskatchewan. Water-based recreation, lakes, beaches and resorts are important themes. Lack of congestion and accessibility are secondary themes. Emphasis will be on the vacation opportunities on this side of the border. "We should take a look at Saskatchewan this summer."

Unpaid Media

Unpaid media efforts will be co-ordinated with the advertising campaign to create extensions. Through the media on tour program, editorial will be encouraged which highlights product diversity in Saskatchewan.

Promotions

Advertising objectives will be developed to coincide with generating interest in Saskatchewan prior to marketplace activity. A public relations program will be undertaken in conjunction with the Calgary Stampede to build market support and interest through a variety of channels.

July	Calgary Stampede, Calgary, Alta	Consumer

MANITOBA

Trends

Manitoba travellers to Saskatchewan exhibit the following travel characteristics:

- Manitobans made 291,000 overnight or longer trips in Saskatchewan in 1998, an increase of 3% over 1996. Preliminary information for 1999 appears to indicate increased visits in the summer, but decreased visits for the remainder of the year.
- The greatest number come to visit friends or relatives, followed by pleasure or vacation
- Manitoba is perhaps the most difficult market to influence due to their negative image of Saskatchewan
- They account for 7% of all overnight or longer trips made by Canadians to other provinces and are very likely to travel to Alberta or British Columbia
- Higher levels of travel by the young (both under 24, and 25 to 44) than are experienced from other Canadian markets
- Increased interest in luxury coupled with sports or outdoor activities
- Are replacing some U.S. bound trips with trips to other parts of Canada

Trip Purpose

- Visiting friends and relatives
- Casinos
- Outdoor experiences (e.g. parks, camping)
- Touring
- Urban experiences (shopping)
- Business (meeting and convention)

Further detail on Manitoba travel activity to Saskatchewan is provided in the following chart:

Chart 12

Manitoba Pleasure Visitors' Most Popular Activities

Visit friends or relatives	71%
Shop	59%
Sightsee	61%
Participate in sport/outdoor activity	54%
Visit a casino	6%
Attend a festival or fair	16%
Attend a sports event	17%
Visit a museum or art gallery	27%
Visit a historic site	26%
Swim	22%
Golf	18%
Walk or hike	33%
Visit a national/provincial park	34%

Marketing Objective

- Tourism expenditures in 1999 attributable to Manitoba are estimated to be $50 million. The 2001 objective is to increase tourism expenditures from Manitoba 2% over 1999 levels.

Marketing Strategy

- Expand/maintain use of direct mail to qualified Manitoba households
- Expand knowledge and use of Tourism Information Centres at border crossings as resource centres to invite extended stays
- Organize Winnipeg Camping and RV Showcase in conjunction with industry partners
- Target key travel associations (e.g. CAA) through direct sales calls to increase member knowledge of Saskatchewan products
- Partner with the CTC in co-op newspaper inserts
- Participate in CTC Rediscover Canada Vacation program

Creative Direction

Creative for Manitoba will expand upon the existing stereotype of Saskatchewan. Cities, cowboys, dinosaurs and events are important themes. Hospitality and accessibility are secondary

themes. Emphasis will be on telling the Manitoba resident what they don't know about Saskatchewan – but perhaps thought they did. "Maybe we should take another look at Saskatchewan this summer."

Unpaid Media

Unpaid media efforts will be co-ordinated with the advertising campaign to create extensions. Through the media on tour program, editorial will be encouraged which highlights product diversity in Saskatchewan.

Promotions

Where possible, advertising objectives will coincide with generating interest in Saskatchewan prior to marketplaces. A public relations program will be undertaken in conjunction with the show to build market support and interest through a variety of channels.

March	RV and Camping Showcase, Winnipeg, MB	Trade/Consumer

BRITISH COLUMBIA AND ONTARIO

Trends

B.C. and Ontario travellers to Saskatchewan exhibit the following travel characteristics:

- Visitors from B.C. and Ontario totalled 300,000 in 1998, an increase of 16% over 1996. As with other Canadian markets, visits appear to have increased in the summer of 1999, but decreased in the remaining seasons.
- Saskatchewan has a good opportunity to capture visits from these markets as part of an overall east or west trip
- The increase of length of stay of "passthrough" visitors from 1.1 nights in 1996 to 2.7 nights in 1998 is evidence of this potential

British Columbia

- Tendency to venture south for vacations
- Interest in "roots" and simpler lifestyle
- 33% of visitors are over 55 years of age and another 33% are between 35 and 54
- Increasing interest in Canadian products and authenticity
- Some shifting in destination intentions because of overcrowding of destinations in British Columbia

Ontario

- Increasing disposable income but also increasing gap between high/low income groups
- High degree of interest in visiting western Canada – particularly British Columbia
- Increasing ethnic diversity
- High interest in heritage and cultural attractions
- Very well educated
- 33% of visitors are over 55 years of age and another 33% are between 35 and 54
- Difficult to motivate because of propensity to visit traditional cottage destinations in Ontario

Trip Purpose

- Visiting friends and relatives
- Pass-through
- Western experience
- Roots
- Outdoor experiences
- Touring
- Business (meeting and convention)

Further detail on Ontario and B.C. travel activity to Saskatchewan is provided in the following chart:

Chart 13

Ontario & B.C. Pleasure Visitors' Most Popular Activities

Visit friends or relatives	79%
Shop	44%
Sightsee	81%
Participate in sport/outdoor activity	47%
Visit a national/provincial park	52%
Swim	20%
Walk or hike	32%
Visit a historic site	56%
Visit a museum or art gallery	30%
Attend a festival or fair	22%
Attend a sports event	24%
Cycle	4%

Marketing Objective

- Tourism expenditures in 1999 attributable to Ontario and British Columbia are estimated to be $90 million. The 2001 objective is to increase expenditures by 3% over 1999 levels.

Marketing Strategy

- Expand/maintain use of direct mail to qualified B.C. and Ontarian households
- Direct mail/newsletter to meeting and convention influencers
- Target key travel associations (e.g. CAA) through direct sales calls to increase member knowledge of Saskatchewan products
- Target corporate/association influencers to increase awareness of Saskatchewan as a meeting/convention location
- Participate in CTC Rediscover Canada Vacation program

Creative Direction

Creative for British Columbia and Ontario will expand upon the existing stereotype of Saskatchewan. They will visit only if they are coming here anyway (VFR) or if they are passing through. The challenge will be to get the traveller to take a second look. Cowboys, dinosaurs, history, nature and people are important themes. Hospitality and accessibility are secondary themes. Emphasis will be on piquing their interest by sharing insights that are provocative and informative. "Why don't we stay a little longer in Saskatchewan?"

Unpaid Media

Much of the effort expended in these markets will be through unpaid media. Through the media on tour program, editorial will be encouraged which highlights product diversity in Saskatchewan.

Travel Trade

Within select urban centres, attention will be paid to the trade, meeting influencers and the CAA to expand their knowledge of tour packages, vacation trips and city product.

April	Travel and Leisure Show, Toronto, ON	Trade/Consumer
Nov	Ontario Motorcoach Association	Trade

UNITED STATES

The Canadian Tourism Commission Strategic Plan (1999-2000) identified a number of U.S. market segments that offer opportunities for Saskatchewan's tourism industry:

- *Baby boomers and mature* - the dominant trend in the U.S. market is the 78 million aging boomers - aged 41 to 51. They will begin retiring in 2002 as they reach their 55th birthday - crossing that threshold at the rate of 4 million individuals per year. They are the wealthiest and most highly educated generation that the U.S. has yet produced. Expect to see an exponential increase in bookings on the net.
- *Shifts south and west* - southern and western states will show big gains in population between now and 2015. The south will remain the most populated region. None of the states that will experience population growth of 1 million or more are located in the northeast or midwest - Canada's traditional markets. California, Texas and Florida will grow the fastest and the most.
- *Nature and authenticity* - baby boomers have an affinity for nature and for things natural and authentic. Man made attractions may not hold much appeal for aging boomers. They view Canada as the "real" great outdoors, and the Canadian environment as unspoiled, less commercialized, uncrowded and peaceful. Canadian people are seen as friendly, caring and welcoming, not pretentious. Important sub-segments of this market include birders, golfers, history and culture enthusiasts, and groups interested in learning vacations.
- *Empty nesters* - most Americans visiting Canada travel without children and this trend will continue as boomers mature. For many Americans, therefore, Canada is already an adult destination.
- *Single women* - the baby boom has given rise to a number of market sub-segments such as matriarchs. These are independent women of means, aged 50+, who have worked and raised families, often alone, and now have the opportunity to travel. Not only will they travel to visit family, they will also travel for leisure and to meet new people.
- *Increasing ethnicity* - by 2050, Americans who belong to racial and ethnic groups will outnumber non-hispanic whites in the U.S. In the year 2000, this is the case in California and it will be in Texas by 2010. Many large cities have already crossed this threshold.

UNITED STATES - SHORT HAUL

The U.S. short haul market is North Dakota, South Dakota, Montana and Minnesota.

Trends

- Short haul states accounted for 35% of total overnight or longer visits from the United States in 1999, up from 27% in 1998
- Visits of one or more nights in Saskatchewan from short haul markets increased 13% over 1998 to 69,000, while expenditures decreased slightly to $41 million

- Population shrinking as northerners move south and west
- Saskatchewan market shifting away from North Dakota to other short haul states, especially Minnesota
- Economy growing after slow years
- Higher than average family-type travellers
- Outdoor enthusiasts – fishing, golfing, etc.
- About 46% of short haul overnight or longer visitors come for pleasure with the remainder coming to visit friends or relatives (26%) conduct business (15%) or for other reasons (13%)
- 36% participate in a soft outdoor adventure-type activity; 32% enjoy at least one cultural attraction; 18% fish (34% of all U.S. anglers to Saskatchewan)
- Interested in urban product, sports and cultural events

Trip Purpose

- Touring
- Outdoor experiences (e.g. parks, camping)
- Waterbased recreation
- Fishing and hunting
- Soft outdoor adventure (particularly Minnesota)
- Events
- Golf
- Winter experiences
- Visiting friends and relatives

Further detail on U.S. short haul travel activity to Saskatchewan is provided in the following chart:

Chart 14

U.S. Short Haul Pleasure Visitors' Most Popular Activities

Sightsee	65%
Shop	60%
Visit a park or historic site	68%
Visit a museum or natural display	30%
Participate in sport/outdoor activity	36%
Fish/hunt	18%

Marketing Objective

- Tourism expenditures in 1999 attributable to all United States visitors were an estimated $146 million, an increase of 11% over 1998. The objective for 2001 is to increase total U.S. resident expenditures a further 3% over 1999 levels.

Marketing Strategy

- Maintain use of direct mail to qualified households
- Educate travel trade to increase product knowledge through marketplaces and direct sales activity
- Target key travel associations (e.g. AAA) to increase member knowledge of Saskatchewan products
- Encourage development of value-added packages with industry partners
- Partner with the CTC where possible

Creative Direction

Creative for the United States short haul will focus on the quality and diversity of experiences which are right next door. "Your dollar goes farther in Saskatchewan - there has never been a better opportunity to visit our cities, attractions, fishing/hunting and events." Safety, hospitality and family are important secondary themes.

Unpaid Media

Unpaid media efforts will be co-ordinated with the advertising campaign to create extensions. Through the media on tour program, editorial will be encouraged which highlights product diversity in Saskatchewan. Journalists from regional magazines in which Saskatchewan is advertised and from local newspapers will be encouraged to develop story lines that highlight the unique features that Saskatchewan offers. Editorial that emphasizes product diversity and value for dollar will be encouraged.

UNITED STATES - LONG HAUL

The U.S. long haul market is California, Colorado, Florida, Illinois, Indiana, Iowa, Kansas, Michigan, Missouri, Ohio, Oregon, Texas, Washington and Wisconsin.

Trends

- After increasing 37% from 1996 to 1998, visits from targeted U.S. long haul states decreased 21% in 1999 to 85,000. Expenditures by visitors from these states increased 8% in 1999 over 1998 to $79 million after increasing 65% from 1996 to 1998
- Visitors from long haul states have been shown to have very little prior knowledge of exchange rate differentials and can be assumed to be influenced much more by marketing activities than those from short haul states
- Visits from other long haul U.S. states (covered by a variety of

more general advertising activities) increased 11% between 1996 and 1998 and a further 38% in 1999 to 73,000 visits
• Population is getting older – 65% of CTC marketing budget directed to the +45 years of age market
• South and western states will see most of the population growth (particularly Texas, Florida and California)
• Family with children market is on the decline – greater focus on "empty nesters"
• Looking for exciting new travel experiences that add value to their lives

Trip Purpose

• Touring
• Outdoor experiences (e.g. parks, camping, canoeing, birding)
• A significant increase in soft outdoor adventure-type activities by long haul visitors (at least half participate in at least one outdoor activity while visiting)
• Fishing and hunting
• 54% participate in at least one soft outdoor adventure-type activity; 44% visit a cultural attraction or attend a cultural event; 17% fish
• Visiting friends and relatives

Further details on long haul U.S. travel activity to Saskatchewan are provided in the following charts:

Chart 15

U.S. Long Haul Pleasure Visitors' Most Popular Activities

Shop	70%
Sightsee	70%
Visit a park or historic site	75%
Visit a museum or natural display	36%
Participate in sport/outdoor activity	40%
Visit friends or relatives	16%
Attend festival/fair	15%

U.S. travel activity to Saskatchewan is still predominantly summer-based. There is an opportunity with the older demographic in the long-haul states to extend summer offerings into the late spring and early autumn shoulder seasons.

Chart 16

U.S. Residents' Overnight or Longer Trips By Quarter

First Quarter *(January-March)*	6%
Second Quarter *(April-June)*	24%
Third Quarter *(July-September)*	55%
Fourth Quarter *(October-December)*	15%

Marketing Objective

• Tourism expenditures in 1999 attributable to the United States were an estimated $146 million. The marketing objective for 2001 is to increase these expenditures by 3%.

Marketing Strategy

• Maintain use of direct mail to qualified households
• Expand use of Internet advertising tested in 2000
• Educate travel trade to increase product knowledge through marketplaces, direct sales and familiarization tours
• Focus on outdoors and vertical markets with industry partners
• Target cities and trade where access to Saskatchewan has been increased through Open Skies (e.g. Milwaukee, Chicago, Denver, Dallas, Minneapolis, etc.)
• Work with industry partners to develop targetted packages
• Encourage industry participation in the CTC Adventure Journal
• Target key travel associations (e.g. AAA) to increase member knowledge of Saskatchewan products

Creative Direction

Creative for the United States long haul will focus on the quality of Saskatchewan's outdoor experiences using imagery that is spectacular, evocative, and compelling. Promotions will place emphasis on nature, outdoor adventure, fishing and other water recreation activities. Saskatchewan will be promoted as down to earth, a place to escape the hectic pace of life, and as the land of living skies. Authenticity, safety, value, and home of the RCMP are important secondary themes. The invitation to explore new horizons will be offered in a neighbourly context that is intriguing without being threatening.

Unpaid Media

Unpaid media efforts will be co-ordinated with the advertising campaign to create extensions. Through the media on tour program, editorial will be encouraged which highlights product

in Saskatchewan. Media opportunities that encourage editorial coverage about Saskatchewan that is directed toward the travel trade - i.e. AAA, tour operators, travel agents, and group leaders - will be of particular interest.

Unpaid Media

Unpaid media efforts will be co-ordinated with the advertising campaign to create extensions. Through the media on tour program, editorial will be encouraged which highlights product in Saskatchewan. Media opportunities that encourage editorial coverage about Saskatchewan that is directed toward the travel trade - i.e. AAA, tour operators, travel agents, and group leaders - will be of particular interest.

Travel Trade

Within select urban centres, attention will be paid to tour operators and the AAA to expand their knowledge of tour packages and itineraries.

Jan	Anaheim RV Show, California	Consumer/Trade
Jan	American Bus Association	Trade
April	FMCA, Oklahoma City, Oklahoma	Consumer/Trade
Aug	FMCA Convention, Redmond, OR	Consumer/Trade
April	Canadian Specialist, Texas	Trade
April	Jack Rabbit Tours, Sioux Falls, SD	Trade
Oct	Group Leaders of America, Denver	Trade
Nov	NTA, Houston, Texas	Trade

Tourism Saskatchewan will participate in the Canadian Specialist Program - a CTC initiative that targets travel agencies and operators in key U.S. states.

Promotions

Preference will be given to venues that have strong support from industry partners (e.g. SOA). Tourism Saskatchewan will use on-line fulfillment at marketplaces to build a database of qualified consumers for follow up mailings by industry partners after the show.

Jan	Tulsa Sport Travel and Outdoor Show, Tulsa, OK	Consumer
Feb	Greater NW Vacation, Camping, RV show, Minneapolis, MN	Consumer

OVERSEAS – SOUTHEAST ASIA/ WESTERN EUROPE

In 1999, overseas visitation to Saskatchewan rebounded with 61,800 visits of one or more nights to the province. These visitors spent an estimated $30 million, an increase of 43% over 1998 expenditures. This growth was driven by increased visits and expenditures from the United Kingdom, other Europe, Australia and Hong Kong.

The following two charts illustrate the profile of the overseas tourist visiting Saskatchewan. Shopping, sightseeing, parks and cultural activities are the predominant motivators.

Chart 17

Overseas Visitors' Most Popular Activities (all origins)

	All Visitors To Sask	Pleasure Visitors
Shop	77%	82%
Sightsee	81%	92%
Visit a park or historic site	60%	70%
Visit a museum or natural display	48%	55%
Visit friends or relatives	60%	52%
Participate in sport/outdoor activity	22%	14%
Attend cultural events	58%	62%

While summer visitation is very important, the spring shoulder season is also a strong period. Winter, by comparison, generates very little travel activity for Saskatchewan from the overseas market.

Chart 18

Overseas Visitors By Quarter

First Quarter *(January-March)*	4%
Second Quarter *(April-June)*	30%
Third Quarter *(July-September)*	50%
Fourth Quarter *(October-December)*	16%

JAPAN/SOUTHEAST ASIA

The Canadian Tourism Commission Strategic Plan (1999-2000) identified a number of Japanese market segments that offer opportunities for Saskatchewan's tourism industry:

• *Middle silver market* - 45 years and older - represents 50% of the total market to Canada and continues to be the largest market opportunity for Canada. The market is affluent, experienced in overseas travel, and interested in nature and outdoor activities. Their second main interest is history.
• *Office ladies* - 30 years and older - this segment represents 13% of the market to Canada. They have a strong interest in nature and the outdoors. Currently a weak market because of the economic situation but expected to rebound.
• *Student market (shugaku ryoko)* - expected to be strong - with 8,000 students visiting in 1998. This is becoming increasingly popular as Japanese schools incorporate overseas learning programs within their curriculums.
• *Ski market* - travel to Canada by this segment is currently down by 25%. Packages are increasingly incorporating a balance of other type of activities in conjunction with skiing. There is increasing interest in non-ski packages.
• *Overall* - travel by mature couples and female groups without children is expected to exceed previous year's levels for Canada. Women - both married and single - are increasingly independent and making individual choices. Men may travel with their wives, but the wife controls the money and the choice of destination. And there is an increasing shift from purchasing "goods" to "spiritual satisfaction."

Trends

• The Asian economic crisis had a direct impact on visits from Japan and other Asia, decreasing total Asian visits by 30% from 1996 to 1998 to 12,000, and expenditures by 64% to $3 million. Visits from Japan and other Asia rebounded in 1999 to 15,800 and expenditures increased to $5.7 million, bringing Saskatchewan back to 1996 peak levels
• Hardest hit were Japanese business and large group travel. Small groups and visitors from other Asia remained relatively strong, posting a growth of 38%
• Small group travel and visits from other Asia are expected to continue to post modest increases over the mid term as the Asian economy recovers
• Increasing importance of foreign independent travel (FIT)
• Looking for alternatives beyond "Banff"
• Interest in Canada is as high as interest in the U.S.
• Safety, scenery and the attributes related to relaxation and renewal are most important
• Spring is the most popular season for travel, but Saskatchewan visitation is during the summer
• Brochures are the top source of information, followed by travel agents and friends
• Expect travel information to be in Japanese

Trip Purpose

• Touring
• Outdoor experiences (e.g. wildlife viewing)
• Rural-based experiences
• English as a second language
• Student touring
• Business
• Cultural activities

Marketing Objective

• To benchmark activity with existing travel suppliers
• To increase tourism expenditures from Japan by 2%

Marketing Strategy

• Partner with the CTC where possible
• Support educational fair(s) in conjunction with Saskatchewan educational institutions
• Marketplace activity
• Direct sales mission to Japanese tour companies based on Canada's west coast
• Support industry package development and inclusion in trade portfolios
• Familiarization tours
• Identify and coordinate efforts with other possible partners who are developing this market (e.g. STEP)

Creative Direction

The overseas campaign will not include an advertising strategy, although initiatives by CTC or TAWNC would be considered if relevant, timely and cost-effective. Communication will be through trade/consumer activities and direct sales missions to operators that are currently based in British Columbia.

Key messages for Japan include: Canada's west, northern lights, exotic, expansive wide-open spaces, safe and scenic.

Unpaid Media

The strategy in all overseas markets will be to rely heavily on unpaid media. Media outlets will be qualified in terms of the product they represent and their affinity with Saskatchewan's markets.

Travel Trade

The focus will be on trade education to assist agents and wholesalers to influence clients to consider Saskatchewan as a travel option. Emphasis will be on educational events, seminars and familiarization tours that will form the core of travel trade activity. Direct contact with qualified wholesalers and operators will ensure that the inventory of packaged trips to Saskatchewan will increase over time. In all markets, Saskatchewan will be positioned as a new, accessible and undiscovered destination.

Nov	Asia Pacific Marketplace	Trade
May	Rendezvous Canada, Toronto	Trade

Other

Activities of CTC and TAWNC in Saskatchewan's overseas markets will be identified and supported where they complement Tourism Saskatchewan's marketing objectives. Partnering for education, seminars and familiarization tours will be encouraged.

GERMANY

The Canadian Tourism Commission Strategic Plan (1999-2000) identified a number of German market segments that offer opportunities for Saskatchewan's tourism industry:

- *Economizers* - young/middle aged - tend to look for economical travel options and often eager to experience a motor home or RV holiday.
- *Nature lovers* - middle aged - these travellers have generally higher incomes. They are interested in nature-based outdoor experiences and wildlife viewing.
- *Cultural enthusiasts* - middle aged - interested in destinations offering cultural and local festivals, arts, Metis/First Nations experiences and city viewing
- *Sports enthusiasts* - early to late '30s - travellers are younger and adventurous, looking for thrills and excitement. This group is interested in sports events such as skiing, golf, hiking, and water sports.
- *"New" seniors* - this group represents the segment with the highest market share increase. Generally these travellers are active and have a comfortable income.
- *Overall* - German travel intentions are strong. While all-inclusive tour packages are still an important share of the market, less structured packages are in increasing demand. There's an increasing trend toward shorter-term booking cycles to take advantage of special prices. Traditional bookings were at least six months in advance. Canada's scenery, nature product and hospitality are highly valued. But there is a lack of variety in packages, particularly single and all-inclusive accommodation. Canada is also perceived as weak in terms of history and cultural offerings.

Trends

- Visitation from Europe remained stable between 1996 and 1999 at about 32,000 visits
- Expenditures by Europeans in Saskatchewan doubled in 1998 over 1996 contributing $14 million to tourism in Saskatchewan and increased slightly again in 1999 to almost $15 million
- After showing significant increases between 1996 and 1998, visitors from other countries (aside from Asia and Europe) increased 46% in 1999 to almost 15,000 and expenditures again doubled 1998 levels, reaching $9.5 million. These increases were led primarily by Australia and Mexico
- Canada the destination of choice
- Demands for guarantees on travel experiences increasing
- Interest in outdoors continues but interest in luxury resorts as a portion of the trip experience is increasing
- Expect travel information to be in German

Trip Purpose

- Touring
- Outdoor experiences (e.g. canoeing, camping)
- Fishing
- Metis and First Nations experiences

Marketing Objective

- To benchmark activity with existing travel suppliers
- To increase tourism expenditures from Germany by 3%

Marketing Strategy

- Partner with the CTC where possible
- Support tour operator/wholesaler catalogue including Saskatchewan product
- Direct sales mission to Germany
- Marketplace activity
- Familiarization tours
- Identify and coordinate efforts with other possible partners who are developing this market (e.g. STEP)

Creative Direction

The overseas campaign will not include an advertising strategy, although initiatives by CTC or TAWNC would be considered if relevant, timely and cost-effective. Communication will be through trade/consumer activities and direct sales missions to operators that are currently based in Ontario.

Key messages for Germany include: world of adventure, big sky, cowboy, Metis/First Nations, outdoors, fishing.

Unpaid Media

The strategy in all overseas markets will be to rely heavily on unpaid media. Media outlets will be qualified in terms of the product they represent and their affinity with Saskatchewan's markets.

Travel Trade

The focus will be on trade education to assist agents and wholesalers to influence clients to consider Saskatchewan as a travel option. Emphasis will be on educational events, seminars and familiarization tours that will form the core of travel trade activity. Direct contact with qualified wholesalers and operators will ensure that the inventory of packaged trips to Saskatchewan will increase over time. In all markets, Saskatchewan will be positioned as a new, accessible and undiscovered destination.

Other

Activities of CTC and TAWNC in Saskatchewan's overseas markets will be identified and supported where they complement Tourism Saskatchewan's marketing objectives. Partnering for education, seminars and familiarization tours will be encouraged.

UNITED KINGDOM

The Canadian Tourism Commission Strategic Plan (1999-2000) identified a number of U.K. market segments that offer opportunities for Saskatchewan's tourism industry:

• *Nature lovers and fans of wide open spaces* - 45 years and older - one third of the U.K. market visiting Canada, these are affluent, well educated travellers who prefer independent travel. Vacations for this segment include outstanding scenery, wildlife, national parks, forests, lakes, rivers, small towns and environmental sites.

• *Cultural enthusiasts* - 45 years and older - also one third of the U.K. market. Many of the same traits as nature lovers, but also interested in museums, art galleries, historic sites, and other cultural attractions.

• *Adventurers* - aged 25 to 45 - these represent the last third of U.K. travellers. This segment includes singles and affluent couples with no children who participate in a variety of sports events including golf, skiing, water sports, hiking, etc.

• *Overall* - U.K. travellers are becoming more independent and are seeking more individualized offerings not available in main stream packages. They are highly motivated to receive value for money, and price is often a determining factor. Canada is perceived generally by non-visitors as an expensive destination. Visitors, however, perceive Canada as good value for money. Increasing demand for shorter break vacations (six to seven days), and increasing disenchantment with Mediterranean destinations are opportunities for Canada. There is also increasing interest in outdoor adventure product in which Canada is perceived to be strong.

Trends

• In 1999, overnight or longer visits from the United Kingdom increased 29% over 1998 levels to 14,400 and expenditures jumped 67% to $7 million
• Increasing interest in accessible outdoors as habitat in Europe disappears
• Niche market for fishing
• Increasing demand for environmental responsibility in destination of choice
• Economic outlook improving over balance of 1990s
• Only major offshore market which showed growth to Canada in 1997

Trip Purpose

• Touring
• Visiting friends and relatives
• Outdoor experiences (e.g. parks, camping)
• Fishing

Marketing Objective

• To benchmark activity with existing travel suppliers
• To increase tourism expenditures from the U.K. by 5%

Marketing Strategy

- Partner with the CTC where possible
- Support tour operator/wholesaler catalogue including Saskatchewan product
- Marketplace activity
- Familiarization tours
- Identify and coordinate efforts with other possible partners who are developing this market (e.g. STEP)

Creative Direction

The overseas campaign will not include an advertising strategy, although initiatives by CTC or TAWNC would be considered if relevant, timely and cost-effective. Communication will be through trade/consumer activities and direct sales missions to operators that are currently based in Toronto.

Key messages for the U.K. include: Canada's west, great outdoors, wildlife viewing, and heritage.

Unpaid Media

The strategy in all overseas markets will be to rely heavily on unpaid media. Media outlets will be qualified in terms of the product they represent and their affinity with Saskatchewan's markets.

Travel Trade

The focus will be on trade education to assist agents and wholesalers to influence clients to consider Saskatchewan as a travel option. Emphasis will be on educational events, seminars and familiarization tours that will form the core of travel trade activity. Direct contact with qualified wholesalers and operators will ensure that the inventory of packaged trips to Saskatchewan will increase over time. In all markets, Saskatchewan will be positioned as a new, accessible and undiscovered destination.

Other

Activities of CTC and TAWNC in Saskatchewan's overseas markets will be identified and supported where they complement Tourism Saskatchewan's marketing objectives. Partnering for education, seminars and familiarization tours will be encouraged.

"I am writing as a Saskatchewan resident to comment on your advertisement on TV during the Brier curling. I want to commend the people responsible for this ad. I think it is great and well done and we should be real proud of our province and what we have to offer, this commercial depicts it beautifully. Keep up the good work at trying to promote our beautiful province. A job well done!"

- Barry Forbes, Maple Creek, SK

8.0 Vertical Markets

In Saskatchewan's vertical markets the focus is on increasing the market base by targeting consumers directly with the message that Saskatchewan is a desirable vacation destination. The advertising campaign, supported by public relations activities and a strong Internet presence, will form an integrated marketing program to deliver a consistent message about Saskatchewan.

In U.S. long-haul markets, Tourism Saskatchewan will consider reaching special interest audiences through direct mail, purchased-lists and Internet advertising.

Broadening the partnership base and including non-traditional partners where possible will be key initiatives.

A priority will be defining unique advantages that Saskatchewan offers in each of its vertical markets that will allow for competitive positioning in the marketplace.

Where possible, product interests will be surveyed as part of the fulfillment process across all of Saskatchewan's geographic markets.

FISHING

Overview

- Fly-in - markets include Germany, Japan, Minnesota (also a drive-in market) and the long-haul U.S. states - including Wisconsin, Illinois, Colorado, Kansas, Missouri, Iowa, Oklahoma, Texas, Ohio, Michigan, Florida and Indiana
- Drive-in - markets include Saskatchewan, nearby Canadian provinces and U.S. states - including North Dakota, South Dakota, Montana, Nebraska and Wyoming
- 16% of all U.S. adults went fishing in 1995 - 26 million over a three year period
- 54% of Saskatchewan's American market continues to come from the central states (with population shifts to the south, product development and marketing activities will require adjustments to appeal to emerging markets over the next 10 years)

Marketing Objective

• Generate 20,000 new attributable fishing inquires (1999 generated 20,349 fishing inquiries)

Marketing Strategy

• Direct mail to qualified respondents, possibly in conjunction with non-traditional partner
• Focus marketplace activity in developing markets
• Product profile and operator links on the Internet
• Provide brochure fulfillment opportunity for operators wanting to market to this audience
• Convene outfitters' task force to determine marketing opportunities with Tourism Saskatchewan
• Continue database application at marketplaces which focuses on providing consumers with qualified listings of outfitters
• Compile fishing licence activity by origin for the last year

Creative Direction

Creative for "fly-in" will emphasize the total experience (e.g. float plane, big fish, shore lunches), catch-and-release (sustainability), the Northwest Airline connection through Minnesota, and pure and natural. "This was a dream come true."

Creative for "drive-in" will focus on fishing as an augmentation to an existing experience - e.g. visiting a lakeside resort and getting back to nature. It's a great way to catch up on some time with the family and friends. "Next time, I'm going to stay longer."

HUNTING

Overview

• Markets for Saskatchewan include long haul U.S. states - both central and western regions
• Segments include gamebird, bear, whitetail deer and moose
• The hunting market within Canada is approximately 802,000
• U.S. visitation to Canada that includes hunting and/or fishing is 355,000
• Tends to be a predominately male sport
• On the decline as a leisure activity in both Canada and the United States, however, decreasing world product will keep demand for Saskatchewan hunting experiences high

"Wow, what a great website.

You have tried to cover all areas

that a person would be interested

in visiting or doing while in

Saskatchewan. Bravo!"

- Susan Baker, via e-mail

Marketing Objective

• Generate 4,000 new attributable inquiries (1999 generated 7,895 hunting inquiries)

Marketing Strategy

• Emphasis on hunting product, in conjunction with fishing, at appropriate sports shows in nearby and long haul markets
• Use fishing and hunting guide for fulfillment
• Provide brochure fulfillment opportunity for operators wanting to market to this audience
• Product profile and operator links on the Internet
• Analyze hunting licence allocation to assess market opportunities
• Continue successful Internet advertising to hunters

Creative Direction

Creative will emphasize quality of product and untapped potential. This is a land still undiscovered. Where possible, links with fishing will be emphasized in advertising and consumer marketplaces. "What a great experience - I got what I came for."

PARKS/CAMPING/RECREATIONAL VEHICLE (RV)

Overview

• Markets include nearby Canadian provinces, pass-through, and long haul U.S. states - both western and southern regions
• The U.S. market represents 6.9 million RV trips; generating over 26 million nights of visitation. Total U.S. camp/trailer visitation to Canada in 1994 was 350,000
• In a 1997 survey of advertising generated inquirers, 18% of Alberta/Manitoba respondents, 14% of Plains states respondents and 36% of Mountain/Pacific states respondents indicated they prefer RV for trips outside their home state or province
• A growing market as the baby boom advances in age
• Willing to travel during shoulder seasons and for longer periods of time

Marketing Objective

• Generate 25,000 new attributable RV-related inquires (1999 generated 31,884 inquiries)

Marketing Strategy

- Direct mail to qualified respondents, possibly in conjunction with non-traditional partner
- Marketplace activities at RV venues and consumer shows in Canada
- Continued work on future FMCA convention to be held in Saskatchewan
- Itinerary development for RV groups
- Direct sales
- Familiarization tours
- Test short-haul campaign in partnership with North Dakota
- Work with national/provincial parks and tourism regions

"This (web) site was wonderful. It's nice to be able to go on-line and be able to see where all the lakes and small towns are along the way, and plan our vacation."

- Christine Lawson, Saskatoon, SK

Creative Direction

Creative will emphasize lakes, parks, golf, open spaces, health and heritage. The audience is affluent, seasoned, and interested in new experiences and new learning. Safety and security is also important. "I didn't know Saskatchewan had so much to offer."

SENIOR AND HEALTH

Overview

- Markets include Canada, long haul U.S. and pass-through
- In 1996 the first of the 9.7 million baby boomers in Canada (and 78 million in the U.S.) turned 50. By the year 2005, they will form the majority of those aged 50 to 74. Their impact on travel in Canada will be profound
- Over the 1990s those over 55 have dominated the U.S. market to Saskatchewan – comprising 50% or more of our U.S. visitors
- 23% of Saskatchewan's visitors from other parts of Canada are over 55, as are 16% of resident travellers within the province. These percentages of travel are expected to increase over the next decade
- The mature segment of the American population will fuel growth in international travel from 2001 to 2020
- The demand for existing products for mature travellers won't necessarily grow with the growth in this portion of the population, as these new "seniors" will be looking for authentic, natural tourism experiences. Learning, nature, culture and quality will be key
- Canadian seniors show particular interest in value-added packages for spring and fall

Marketing Objective

- Complete update of Tour Planner Manual with support of tourism regions
- Generate 4,000 new attributable golf-related inquiries (1999 generated 4,305 inquiries)
- Generate 3,000 new attributable spa-related inquiries (1999 generated 4,905 inquiries)

Marketing Strategy

- Marketplace/direct sales with tour operators and travel planners in select markets
- Product profile and operator links on the Internet
- Familiarization tours
- Direct mail to industry operators/influencers
- Work with industry partners to develop targetted packages
- Provide brochure fulfillment opportunity for operators wanting to market to this audience

Creative Direction

Creative will emphasize health, touring, safety and culture. This market offers potential for packaging with the spa, casino and golf product in Saskatchewan. Today's seniors are hands-on, active and ready for something new. Safety and security is also important. "I had a great time - and the service was excellent."

MEETING AND CONVENTION

Overview

- Primary markets include Saskatchewan and Ontario; secondary markets are Manitoba and British Columbia
- Market also includes Canadian-based national associations, corporations and sports organizations
- Within Canada, total inter-provincial business trips of more than one night accounted for 3.3 million visits; convention trips accounted for 94,000 visits in Saskatchewan in 1994

Marketing Objective

- Identify and contact 50 leads from the meeting and convention market
- Confirm eight bookings with industry partners by the end of the 2000/2001 campaign

Marketing Strategy

- Qualify meeting and convention contacts from databases provided by cities
- Update database on basis of sales calls conducted by industry partners
- Biannual newsletter to key contacts with editorial provided by partners
- Continued liaison on meeting and convention committee with Regina and Saskatoon

Creative Direction

Creative will emphasize hospitality, capacity to deliver, access and value. Creative will acknowledge the stereotype of Saskatchewan to the Canadian market and then broaden that depth of knowledge (e.g. "Beyond the Wheat Fields"). "Wow – I had no idea that this was even in Saskatchewan."

OUTDOOR ADVENTURE (WILDLIFE/BIRD/NATURE/CANOE/RAFT/HORSE)

Overview

- Markets include Saskatchewan, pass-through, Manitoba, Alberta, long-haul U.S. and overseas
- Over 85 million Americans enjoy birding, with over 25 million considering themselves to be "avid" watchers, prepared to travel in pursuit of their hobby. Birding is second only to gardening as the most popular leisure-time activity. The value of the U.S. market is estimated at $14 billion.
- U.S. canoeing market is conservatively estimated at 3.6 million avid canoeists; Canadian market is approximately 200,000 (operator-based measurement) and does not include canoeing as part of a broader experience
- 86% of U.S. respondents in the 1994 Northern Tier Study indicated that the chance to see wildlife and undisturbed nature was important, with visitors to Saskatchewan ranking this asset even higher (91%)
- In 1998, an estimated 150,000 travellers included birding or wildlife viewing as an activity in Saskatchewan
- The demographics of canoeing are generally young, affluent males; although there are some indications that more mature travellers are increasing in presence
- Germany represents 31% of the Canadian canoeing market; U.S. 14% and the U.K. 4%
- Saskatchewan offers at least 17 full canoe trip outfitters and several dozen suppliers. The industry has good infrastructural support, including route maps, guide service and an Internet presence.

Marketing Objective

- Generate 10,000 new attributable wildlife viewing inquiries (1999 generated 10,358 inquiries)
- Generate 9,000 new attributable ranch/farm vacation inquiries (1999 generated 9,068 inquiries)
- Generate 5,000 new attributable canoeing inquiries (1999 generated 5,925 inquiries)

Marketing Strategy

- Participate in CTC Adventure campaign
- Product profile and operator links on the Internet
- Emphasis on outdoor adventure product at appropriate marketplaces in nearby and long haul markets
- Provide brochure fulfillment opportunity for operators wanting to market to this audience
- Contact associations, publications and travel influencers specializing in outdoor adventure vacations to ensure Saskatchewan is represented
- Consider development of a fulfillment piece with SERM and Heritage Canada that is parks-specific
- Continue working with overseas trade to carry Saskatchewan outdoor adventure itineraries
- Continue to test Internet advertising vehicles and creative

Creative Direction

Creative will emphasize access, diversity and number of species, UN recognition and viewing locations. Attention will be paid to unique positioning - e.g. oldest bird sanctuary in North America, greatest diversity of songbirds at any one location in North America, etc. Wildlife viewing in general will be a complementary theme that can be promoted to this audience. "Saskatchewan is definitely on my list of places to go."

WINTER EXPERIENCES

Overview

- Markets include Saskatchewan, Manitoba, Alberta and U.S. short haul
- There are over 600,000 active snowmobilers in Canada. Memberships in snowmobile clubs in Canada grew from 340,000 in 1994 to over 370,000 in 1995
- Dog sledding and cross country skiing are increasing in importance as ancillary winter activities – often combined with nature viewing and/or snowmobiling
- There are currently in excess of eight dog sled races held annually in Saskatchewan
- A new dog sled event from Prince Albert to La Ronge (Canadian Challenge sled dog race) is in its third year of operation
- Current winter sport/activity participation on trips in Saskatchewan is estimated at 100,000 travellers (cross country and downhill skiing, snowmobiling and other outdoor activities)
- The market in the three prairie provinces, and North Dakota, Minnesota and Montana, for winter tourism is estimated to be almost one million persons

Marketing Objective

- Generate 2,000 new attributable inquiries (1999 generated 4,505 winter-based inquiries)

Marketing Strategy

- Product profile and operator links on the Internet
- Work with industry partners to develop value-added packages, specifically targetted to snowmobile, dog sled and family activities
- Provide brochure fulfillment opportunity for operators wanting to market to this audience

Creative Direction

Tourism Saskatchewan will encourage tourism regions to focus on the quality and fun of Saskatchewan winters (e.g. quality of trails, diversity of winter experiences, easy access, and fun for the family). Emphasis will be on enjoyment, "apres-ski", bonding with friends/family, and range of activities. "I never expected winter to be this much fun."

CULTURE AND HERITAGE

Overview

- Current size of the market is 720,000 travellers. Of these 570,000 are on trips of one or more nights in Saskatchewan
- Culture and heritage is generally a component of a broader experience
- Saskatchewan residents account for 48% of cultural activity travellers. Other Canadians make up 34% of these trips, Americans 11% and overseas visitors 7%. This market mix will vary somewhat for each cultural activity or attraction. (Note: local residents are not included in these figures)
- Interest is increasing – particularly as a function of an aging population base and interest in "roots"
- Alberta and Manitoba pleasure travel markets are interested in heritage product and the maturing American market considers culture and heritage an important trip activity

Marketing Objective

- Generate 13,000 new attributable inquiries (1999 generated 12,286 inquiries).

Marketing Strategy

- Product profile and operator links on the Internet
- Provide Internet access to the Tourism Saskatchewan events calendar
- Feature culture and heritage themes in newspaper supplements and literature series
- Encourage industry partners to develop value-added packages featuring culture and heritage attractions
- Provide brochure fulfillment opportunity for operators wanting to market to this audience
- Continue progress with the Aboriginal product club to develop market-ready locations

Creative Direction

Creative will emphasize Saskatchewan's "living heritage" through its Metis/First Nations people, historical sites, museums, performing arts, and ethnic diversity. Emphasis will be on "doing" and not just "seeing." Experiences for young and old alike. "This is exciting – and my kids love it as well."

II. PRODUCT DEVELOPMENT 2000/2001

Saskatchewan's tourism products are exciting and diverse. They include unspoiled wilderness and abundant wildlife populations, inspiring cultural festivals, and enthusiastic events. Our heritage and lifestyles are interpreted through museums and cultural centers throughout the province. Our accommodation, food services, and attractions project an image of value to visitors, and occupancy rates are among the highest in Canada.

Given these resources and increasing market interest in the products Saskatchewan offers, the province is well positioned to exploit new opportunities for dynamic and profitable tourism product development.

Adding to this momentum, the Strategic Investment Framework for Saskatchewan's Tourism Industry was completed in July 2000. The report had been commissioned to provide the Government of Saskatchewan, Tourism Saskatchewan, and the Federal Government with a focus for pursuing product development priorities in collaboration with the public and private sectors.

The framework included an assessment of Saskatchewan's tourism infrastructure and assets, and has confirmed a number of priorities for tourism product development, and public sector investment in tourism infrastructure. An addendum to the business plan will be provided as the framework is finalized.

Tourism Saskatchewan's initiatives will be concentrated in key opportunity areas, as outlined below.

1. Priorities – Current and Future

Aboriginal Tourism

Aboriginal tourism is defined as "any tourism product or service that is owned and operated by Aboriginal people." This definition encompasses all businesses and attractions, regardless of whether or not Aboriginal cultural themes or content are featured.

The Market Analysis for Aboriginal Theme Tourism Products in Saskatchewan, completed in 1996, indicates that ownership and employment in traditional tourism businesses (outfitting lodges, accommodation, service stations, charter air lines, etc.) will produce the majority of economic benefits for Aboriginal people through tourism. A wide range of training, education, advisory and financial resources are available to assist in the development and expansion of these viable commercial services. The analysis also notes that the cultural content of Aboriginal tourism provides particular appeal to an affluent offshore tourism market niche.

The Metis Tourism Development Strategy, released in 1998, notes that increasing numbers of international visitors seek to discover and have direct contact with Canada's Aboriginal populations, and to become familiar with Aboriginal heritage and way of life. The strategy has identified opportunities for new and exciting adventure experiences, and all of them are based on the appeal of Metis history, culture, and traditions.

In 1997, the Aboriginal Waterways Product Club was established with a view to developing market-ready Aboriginal tourism products based on the early fur trade years, along the Saskatchewan, Qu'Appelle and Assiniboine river systems. A considerable amount of work was undertaken in terms of mapping actual locations with development potential, preparing an attractive VHS video presentation, creating greater tourism awareness among Aboriginal organizations and lenders, completing a Market Development Strategy, and establishing the Aboriginal Waterways web site.

Further advancement of these initiatives will require additional resources, and opportunities to augment human and financial resource commitments from Aboriginal organizations will be explored in 2000/2001. It is hoped that support from other stakeholders will also be forthcoming.

It is also the intention of Tourism Saskatchewan to expand its working relationship with the First Nations and the Metis Nation in order to facilitate and support the growth of Aboriginal tourism in the province.

Agritourism

Agritourism involves travel for the purpose of participating in experiences related to agriculture. The Saskatchewan Agritourism Strategy was completed in 1998. A broad range of opportunities was identified, and recommendations were made with respect to organizational development, product development, promotion, and implementation.

Some examples of agritourism products available today are farm vacations, historic farm attractions (such as Motherwell Homestead National Historic Site and the Seager Wheeler Farm National Historic Site), agricultural fairs, rodeos, settlement and Western Development museums, major conferences and conventions, drama presentations, and fowl suppers.

During June 2000, a one-day agritourism workshop was held in conjunction with the Farm Progress Show in Regina. The workshop identified tourism-related commercial opportunities and services that can be provided by existing farming and ranching operations. Presenters emphasized the need for providing visitors with high quality experiences, and it was concluded that a system of recognizable and reliable standards would assist in the development of agritourism products and the expansion of agritourism markets.

During 2000/2001, Tourism Saskatchewan will be working with the Saskatchewan Country Vacation Association, and other stakeholders, to develop an accreditation system for events, accommodation, and other attractions, which will complement that organization's "Black Rooster" guarantee program. Once a consensus has been reached among the various stakeholders involved, the system will be introduced at an agritourism conference. The formation of a "flagship consortium" of agritourism operations, as described in the province's Agritourism Strategy, will be facilitated by this process.

Business Advisory Services

There is a steady demand from attractions, businesses, and other agencies for information and advice upon which to base investment and operational decisions. Requests for assistance frequently involve financing and re-financing, accessing Crown land for tourism and recreation, re-zoning and extension of municipal and/or provincial infrastructure, and evaluating the feasibility of proposed new ventures and expansions.

In order to provide business advisory services more efficiently, Tourism Saskatchewan is preparing a Tourism Business Development and Financing Guide which deals with financing and planning issues in considerable detail. This guide will also serve as a useful tool for pro-active initiatives, in which Tourism Saskatchewan has identified opportunities to establish tourism attractions and businesses, and seeks to match them with optimal human and financial resources.

Tourism Saskatchewan will also continue to partner with other organizations and stakeholders to develop useful publications and information sources. Past examples include Developing Your Wildlife Viewing Site, the Ecoregions of Saskatchewan CD-ROM, and the "Horizons" Ecotourism Accreditation System. Preparation of a guidebook for the construction of ecolodges in Saskatchewan is planned for 2000.

Community Tourism Planning

Saskatchewan communities are increasingly turning to tourism as an opportunity for economic diversification and new jobs. Communities are concerned as well with a strategic approach to tourism planning and development that builds on current strengths with resources that are available.

Accordingly, Tourism Saskatchewan has undertaken to produce in 2000/2001 a Community Tourism Planning Guide which community leaders will be able to use to help direct and focus tourism planning capabilities. Tourism Saskatchewan believes the process can be a catalyst for community residents and leaders who are interested in exploring opportunities available to their communities through tourism.

New programming will be developed to support workshops and consultation with a number of communities through 2000/2001.

Cultural Tourism

Cultural tourism involves travel to experience historic, artistic, scientific, lifestyle, or heritage offerings of an individual community, group, region, or institution, to increase one's knowledge, understanding, or appreciation of an area's culture.

The 1997 Cultural Industries Development Strategy for Saskatchewan concluded that cultural industries are a key component of the tourism and cultural industries' cluster of activity in the Saskatchewan economy. Access to authentic cultural experiences and attractions is becoming an increasingly

strong motivator for visitor travel. Opportunities for cultural enterprises and traditional tourism enterprises to position themselves to further benefit from this market trend must be examined.

The 1998 report on Cultural Tourism Opportunities in Saskatchewan also identified a number of issues which can impede the effectiveness of co-operation among cultural and tourism enterprises. The authors of the report explained that the business community could benefit from a greater awareness and understanding of cultural enterprises. They also observed that cultural enterprises could be strengthened through greater awareness of collaborative opportunities within the business community.

During 2001, Tourism Saskatchewan will be working with representatives of the cultural community, the tourism industry, and both federal and provincial governments, to hold a Cultural Tourism Symposium. The symposium will assist the tourism and cultural communities to develop a basis for joint programming, packaging, and marketing, while understanding the perspective and values that each partner brings to the potential partnership. The symposium will also provide an opportunity to address the need for skill development, specifically in the areas of marketing, packaging, research, and customer service.

Ecotourism

Ecotourism is environmentally responsible travel to relatively undisturbed and uncontaminated natural areas, with the objectives of studying, admiring, and enjoying the scenery, wild plants and animals, and cultural features. It promotes conservation and economic benefits to local communities.

The Ecotourism Strategy for Saskatchewan was completed in 1996. This three-part strategy identified significant natural features within Saskatchewan's 11 ecoregions, which could be capable of attracting international, national, and regional visitors, when carefully packaged and marketed.

A number of businesses have become engaged in or are establishing ecotourism operations in each of these ecoregions at this time. These businesses are all nature based. They offer products such as accommodation, interpreted guided tours by canoe, horseback, horse drawn wagon, dog sled, tour boat, and other experiences such as hiking, cross-country skiing, and nature viewing. Interest in pursuing business opportunities in this sector is growing steadily.

During April 2000, a new ecotourism accreditation system – "Horizons" – was introduced in Saskatchewan. The system was developed jointly by the Ecotourism Society of Saskatchewan and Tourism Saskatchewan. It was developed in response to the need to identify and promote genuine ecotourism operations and "best practices." It was felt that by branding or labeling through accreditation, Tourism Saskatchewan could expand the business opportunities available to these operations, while ensuring the conservation of the natural resources upon which they depend.

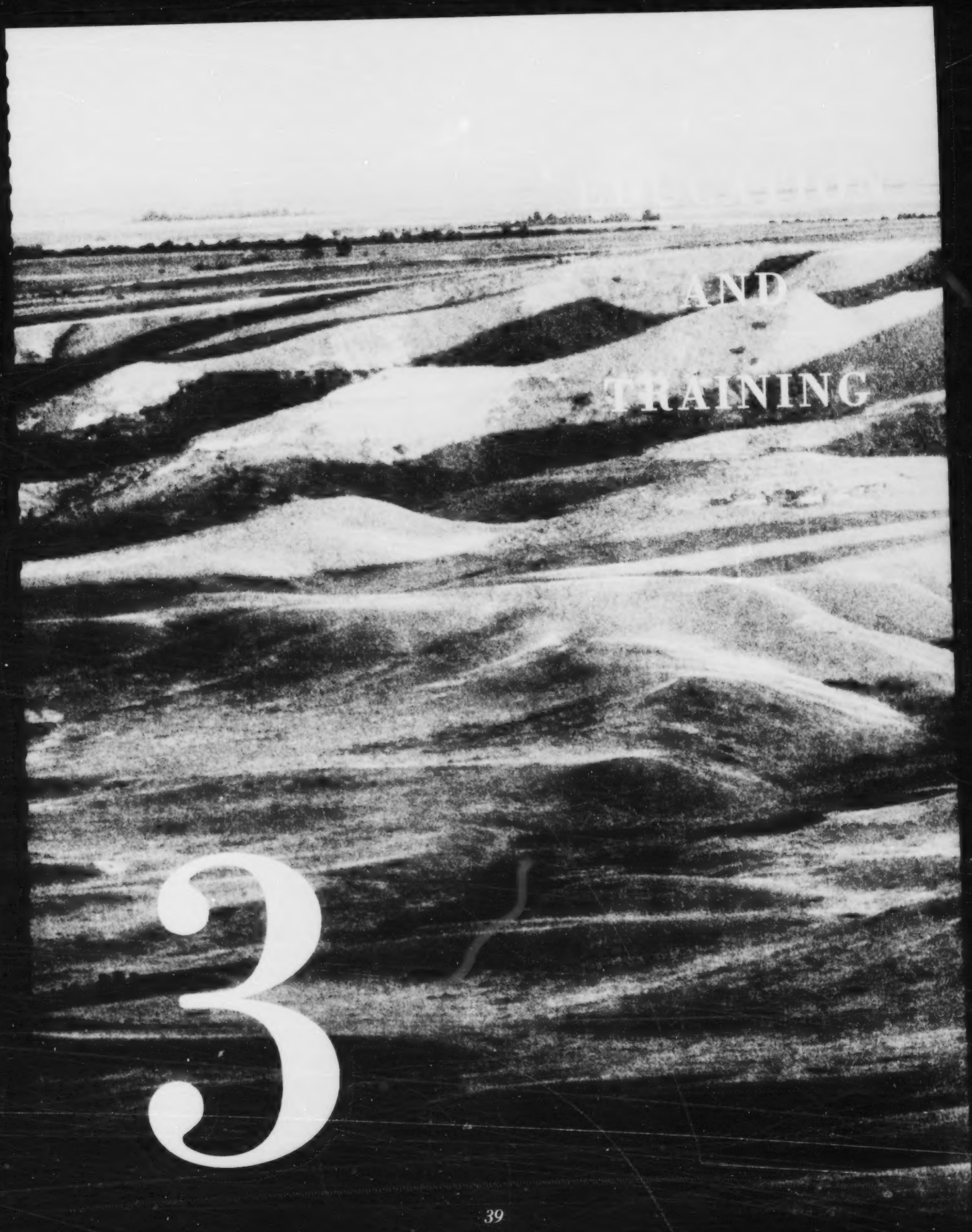
During 2000/2001, Tourism Saskatchewan will be working with entrepreneurs interested in expanding their existing ecotourism operations, others wishing to diversify in response to this market, and new businesses as they become established. Tourism Saskatchewan will also continue to play an active role in assisting the Ecotourism Society to implement the new accreditation system.

Land Use Planning

Integrated land and resource management planning is a process resulting in planned and strategic allocation of land and resources. Businesses providing adventure tourism, ecotourism, and hunting and fishing experiences, require access to Crown land and natural resources in order to survive. It is therefore essential that tourism resource values and interests be included in the province's land use planning processes.

Until the early 1990s, Crown land and resource management decisions made by regulatory authorities tended to be unilateral and one-dimensional. Large parcels of Crown land were dedicated to single use, such as forestry, agriculture, mineral exploration and development, with little appreciation for additional or multiple usage. This approach has changed, and natural resource management agencies are now more receptive to the concept of "sustainable development", which considers all aspects of the natural environment, including impact on tourism, prior to making resource allocations.

At present, there are 11 Land Use Plans under way in Saskatchewan – seven covering Crown land administered by Saskatchewan Environment and Resource Management, and four covering Crown land administered by Saskatchewan Agriculture and Food. Tourism Saskatchewan monitors all of these and tries to ensure the tourism industry is represented in these processes by sector and/or regional organizations, or by individual operators. Tourism Saskatchewan is playing a direct consultation role in five of the planning initiatives.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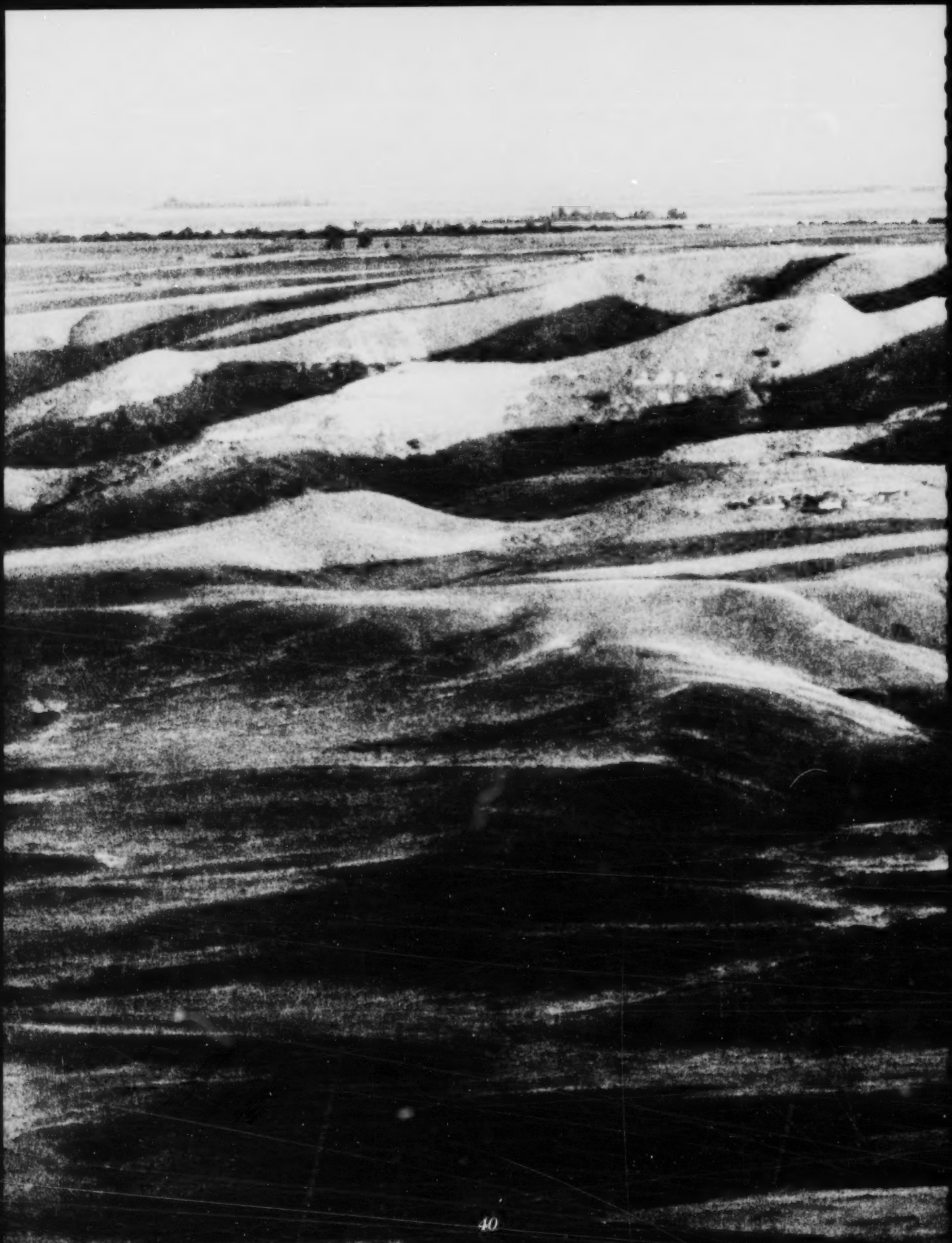


III. EDUCATION AND TRAINING - SASKATCHEWAN TOURISM EDUCATION COUNCIL

"STEC has provided excellent service in delivering quality training to our employees. As a consequence of the training, we have seen a notable difference in the attitudes and service delivery of personnel on the service floor, particularly in the restaurant. We implemented the program to move our service ratings from good to very good and our exit interviews have shown that we are achieving the desired results."
- Brian Lynch, Casino Regina

Background

The tourism industry in Saskatchewan has made significant strides toward addressing the human resource issues identified by its sector associations and by various human resource studies done between 1985 and 1997. The industry's collective objective has been to raise the levels of professionalism across the industry by developing products, programs and services to:

- improve human resource management and training practices
- reduce turnover
- improve image of tourism as a viable career choice
- increase training and education levels
- enhance self-esteem of tourism workers
- encourage greater relevance of existing post-secondary and technical training for tourism

Since the industry's creation of the Saskatchewan Tourism Education Council in early 1990, and with financial support from both provincial and federal governments, thousands of volunteer hours have been invested by Saskatchewan's tourism industry employers and employees in order to implement the recommendations consistent across all of the human resource studies. The merger of STEC with Tourism Saskatchewan in 1996 has reinforced the commitment of the industry to tourism education and training.

To date, 43 national occupational standards and 26 national certification programs have been developed across all eight sectors of the industry (accommodation, food and beverage, adventure tourism and recreation, events and conferences, tourism services, travel trade, transportation, attractions). Supporting resources have also been produced in the form of workbooks, trainers' guides and workshops, videos, etc.

Tourism education councils exist in each province and territory, and work closely together to avoid duplication of effort and ensure effective and efficient use of human and financial resources. This national collaboration is co-ordinated by the Canadian Tourism Human Resource Council; and, as a founding member, Saskatchewan's tourism industry continues to play a leadership role in development and implementation of these "by industry, for industry" initiatives. STEC is active in all national programs. Representatives from STEC staff participate on most sub-committees, and industry representatives participate on most development groups, to ensure Saskatchewan's industry needs are addressed.

Another long-term strategic partnership has existed since 1991 as the Tourism Standards Consortium. It currently includes the tourism education councils of British Columbia, Alberta, Yukon, Saskatchewan and Manitoba. In an extended final year of Phase III, the TSC once again accomplished much over the past year.

The Phase III project is a realization of the original 1990 proposal for a three-phase project. The plan has evolved considerably since 1990 but the basic premise remains the same:

The tourism industry trains in the workplace and needs appropriate training to ensure that skilled professionals are meeting and exceeding guests' needs.

The relevance of TSC products and services is assured because the industry defines the competencies and develops the recognition. Implementation of standards-based training will ensure the success and sustainable growth of the industry. In order for this industry-driven training model to make sense, it must work well with the education system to ensure that young people leaving the education system and entering the workforce have been exposed to the skills required by the industry. Similarly, tourism workers returning to school should receive recognition for their workplace training.

The TSC Phase III project will benefit the industry by completing the standards, certification and training tool development, ensuring that it is efficient, effective and sustainable, and creating a learning system for the industry that recognizes the needs of all stakeholders.

The objectives under Phase III are as follows:

- create sustainable standards, training and certification

- author and implement a western and northern Canada tourism learning system
- develop human resource planning and training tools for tourism operators and the education system
- facilitate development of Aboriginal tourism human resources
- market existing and new TSC training products and services across western and northern Canada and to other jurisdictions
- prepare for and implement international sales and marketing of TSC products, programs and expertise

"Training has played an important part in our young company. When we first found out about STEC, my business partner, Thierry Sarny, and I enrolled in and completed Tour Guide certification. We are currently enrolled in Tour Director and Heritage Interpreter. Within the next three years, we are going to be certified in five different tourism courses."
- Claire Bélanger-Parker, CNT Tours, Regina

Provincial

Successful initiatives, accomplished through the commitment of STEC staff and the industry, have resulted in a significant increase in requests for all programs, products and services. With the view to ensuring specific needs of Saskatchewan companies and/or individuals are met, STEC continues to test both new and revised products and programs on an ongoing basis. The feedback that's been gathered results in programs the industry can count on to be relevant and useful.

In 1998/99, a new province-wide training needs assessment was completed to assess tourism training needs across all eight sectors of the industry. As well, with Aboriginal tourism growing in importance and impact in the province, it was determined early in the design of the study that Aboriginal training needs deserved separate and specific attention. Sectors were examined separately to ensure that the specific issues of each sector emerged during the research process. The various studies conducted used several quantitative and qualitative research methods including focus groups, interviews, and mail surveys. This document, titled "An Investment in Growth: Training Needs in Saskatchewan's Tourism Industry" will be used to guide tourism training and development planning for the next five years, at which time another study will be undertaken to identify any changes in training needs or priorities, and to highlight any trends.

A number of general themes emerged across all sectors of Saskatchewan's tourism industry—skills that are essential for success no matter where one is employed in the industry. These skills are reported in the study as: a) skills for everyone, e.g., selling skills, managing conflict, problem solving, etc. and b) skills for managers/supervisors/operators, e.g., marketing, financial management, technology, etc.

One of the most consistent themes of the entire study was that the human resource practices in the industry must improve so that the industry can recruit and retain quality workers. Two main areas of emphasis for improvement include more effective workplace training and training support for workplace trainers and supervisors.

Training delivery was also addressed by study participants, who offered several recommendations including time of day and time of year for training, type and length of programs/workshops, and locations for training.

The study also recommended that those offering and delivering training to the tourism industry keep in mind that programs must be low-cost/high-value in order for industry to pay for them. As well, a cost/benefit analysis should be done on training investments to assist operators in making their decisions.

STEC references this needs assessment and provides information from it regularly to other agencies and institutions. For example, SIAST regional needs assessments, Canada/Saskatchewan Career and Employment Centre assessments, and certificate and diploma programs in development and revision, have all been encouraged to consider the industry's identified needs and training methods preferences.

The study is published as a comprehensive document, as well as by individual sector, and is available through STEC.

There is significant recognition of STEC as the human resource development coordinating body of tourism from all levels of industry, government and education. The resulting partnerships have been rewarding for all. For example, STEC has worked closely with the Department of Post-Secondary Education and Skills Training to provide national, industry-developed resources and certification for tourism businesses accessing funding to train new employees and to upgrade existing employees under the Future Skills Program. Unfortunately, the funding available for upgrading existing employees was deleted from the program in April 2000. It is hoped that this funding will become available again.

From October 1, 1999 to June 15, 2000, five employers accessed Future Skills Program funding support to train 44 employees,

and utilized STEC's national materials. The Future Skills Program offers an excellent opportunity for tourism businesses, and for businesses hiring new employees.

Throughout 1999/2000, as they became available, STEC continued to introduce new CTHRC training workbooks and workplace trainers' guides based upon nationally validated occupational standards. At June 15, 2000, these include:

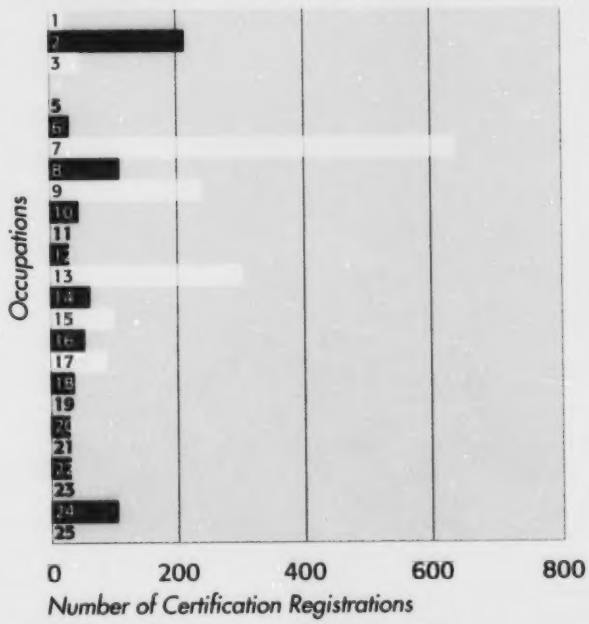
Occupational Workbook	Trainer Guide Available
Bartender	√
Campground Operator	
Entry Level Skills	√
Food and Beverage Server	√
Freshwater Angling Guide	
Front Desk Agent	√
Guest Services Attendant	√
Heritage Interpreter	√
Housekeeping Room Attendant	√
Hunting Guide	
Local Tour Guide	√
Reservations/Sales Agent	√
Sales Manager	√
Special Events Coordinator	
Special Events Manager	
Tour Director	√
Tourism Visitor Information Counsellor	√

Performance First Series
Setting the Stage
One-on-One Training
Great Performances
Winning Ways
Predicting Performance
Less Talk – More Communication
Making Training Work

Business Builders Series
Developing an Operations Plan
Developing Your Business Profile
Getting Your Business Market Ready
Management and Labour Relations
Managing Your Business Finances
Marketing Essentials for Small Business
Sales Forecasting
Shaping Your Business Strategy

It was another excellent year for professional certification in Saskatchewan: 131 individuals achieved certification in 15 different occupations, from 14 different Saskatchewan communities, large and small. Saskatchewan continues to have the highest number of tourism industry workers per capita registered in occupational certification in all of Canada. In addition, at June 15, 2000, 13 individuals had achieved their Journeyperson Certification under the two new trades (Food and Beverage Person and Guest Services Representative) first introduced in Saskatchewan in November of 1996. An additional 48 people are in process towards their Journeyperson Certificates.

CERTIFICATION REGISTRATIONS (BY OCCUPATION AT JUNE 15, 2000)



1 *Banquet Food & Beverage Server*
2 *Bartender*
3 *Beverage Services Manager*
4 *Campground Operator*
5 *Counter Sales*
6 *Director of Sales and Marketing*
7 *Food and Beverage Server*
8 *Freshwater Angling Guide*
9 *Front Desk Agent*
10 *Guest Services Attendant*
11 *Heritage Interpreter*
12 *Host/Hostess*
13 *Housekeeping Room Attendant*
14 *Hunting Guide*
15 *Local Tour Guide*
16 *Reservations/Sales Agent*
17 *Sales Manager*
18 *Special Events Coordinator*
19 *Special Events Manager*
20 *Taxicab Driver*
21 *Tour Director*
22 *Tourism Region Manager*
23 *Tourism Trainer*
24 *Tourism/Visitor Information Counsellor*
25 *Wine Service*

Registrations by Occupation:

Banquet Food and Beverage Server	19
Bartender	207
Beverage Services Manager	34
Campground Operator	2
Counter Sales	0
Director of Sales and Marketing	15
Food and Beverage Server	643
Freshwater Angling Guide	114
Front Desk Agent	238
Guest Services Attendant	33
Heritage Interpreter	19
Host/Hostess	3
Housekeeping Room Attendant	258
Hunting Guide	54
Local Tour Guide	87
Reservations/Sales Agent	47
Sales Manager	80
Special Events Coordinator	133
Special Events Manager	6
Taxicab Driver	59
Tour Director	10
Tourism Region Manager	14
Tourism Trainer	12
Tourism/Visitor Information Counsellor	111
Wine Service	2
TOTAL:	**2,200**

In the eight-month period between October 1999 and June 15, 2000, STEC coordinated standards-based, industry-delivered training programs for more than 2,700 individuals in the tourism industry. The programs range from three-hour seminars to six-month combined classroom and workplace training.

Training Program	Participants
Skill Specific Workplace Training	72
Tourism Careers for Youth	153
Trainees in post-secondary programs using STEC materials, testing, and/or facilitators	95
Workplace Trainer Program	12
Positively Outrageous Customer Service Workshops	128
Saskatchewan Best Customer Service Training	1099
Volunteer Workshop	320
Volunteer Master Trainer Workshop	8
It's Good Business Server Intervention Seminar	819
Other	43
TOTAL	2749

National

Nationally, standards, certification and training resources have been shared and coordinated through the CTHRC. This body is a partnership of Tourism Education Councils in all 10 provinces and two territories, as well as major tourism employers, representatives of tourism workers and a host of educators involved in the delivery of tourism training.

In the past year, the CTHRC has continued to focus on the development of training tools to assist tourism industry professionals in achieving certification and further pursuing their careers. In addition to ongoing development of resources for front-line tourism employees, the development of supervisory (Training for Results series) and management (Business Builders series) tools has also been a priority. The development of these new tools included the national adaptation of products initiated in Saskatchewan, including the Tourism Small Business Operator Skill Development Program, Freshwater Angling Guide and Hunting Guide Workbooks and Trainers' Guides. All of these resources are available through STEC.

Once again, the key to ensuring relevance and usefulness of all resources developed through the tourism education councils and/or the CTHRC remains the extensive volunteer hours of industry practitioners to review and input through each phase of development including content, design and format, and implementation recommendations.

Global

No other country involved in occupational standards and certification utilizes the tourism industry's expertise in this development to the extent that Canada does, the process having been initiated in western Canada, led by the Alberta Tourism Education Council. The Canadian model of standards development has been proven in Canada and the resulting products are now being marketed worldwide by the Tourism Standards Consortium, in partnership with the CTHRC.

Under the trade name Tourism Training Canada, international projects have been completed in Mexico, Malaysia and Jamaica, with others under way in Chile and the Caribbean region.

Several others are in the development stages, including China, and various Latin American countries. Tourism Training Canada, in addition to being a primary contractor in some instances, is subcontracted by Human Resources Development Canada (Canadian International Development Agency), Hickling Corporation, and ARA Consulting (a division of KPMG).

"Thank you for helping our youth with your understanding, respect and ideas. There's so much to say.. But I will keep it safe in the bottom of my heart."

- Tim Naytowhow, Prince Albert TCY participant

Economic

Tourism, which contributes more than $1.1 billion to the provincial economy each year, was the leading industry in job growth in 1997. Compared to job growth of 2.8 per cent across all industries in Saskatchewan, tourism-specific jobs grew by 10 per cent. With employment opportunities in tourism only expected to expand further, this means training and development requirements will increase. The training needs assessment has been widely distributed to help training providers determine where resources and programs would best be allocated, and how they could most effectively be delivered.

Trends

According to Statistics Canada, the Canadian tourism workforce will grow by 3.3% per annum to the year 2005, compared to 1.7% in all other sectors. The tourism industry is experiencing serious labour shortages.

More than half of those working in the tourism industry in Canada have some post-secondary education (Statistics Canada Labour Force Survey, 1994).

According to the KPMG study, *Human Resources of the Canadian Accommodation Industry (1995)*, there is a need and, indeed, a national trend toward multi-skilling in the accommodation sector. This trend provides individuals who would normally only be offered part-time employment with the opportunity to work full-time. It also offers those individuals a great deal more job satisfaction and variety in their work. Cross-training in these multiple skills is required to ensure a smooth transition to this work/organizational model.

An additional trend in the industry is the recognition of the need to empower the front line/first customer contact, resulting in the elimination of organizational layers between the customer and the decision-makers. Front-line service providers will have significantly more decision-making authority. This new factor will require additional training to ensure that these individuals have strong problem-solving and decision-making skills *(Human Resources of the Canadian Accommodation Industry, 1995).*

Saskatchewan business is recognizing the benefit of front line staff training. For example, a number of businesses that participated in subsidized Human Resources Development Canada certification programs in partnership with STEC have continued to offer the same certification without subsidy. Currently there are over 315 tourism businesses participating in certification across Saskatchewan.

Registration in industry certification remains very strong, as does the growing use of standards-based training resources. This is representative of the tremendous growth in recognition of the importance of training in the tourism industry.

Much of the growth in industry training and certification is occurring in new properties and businesses as a means of gaining an edge as they move into a highly competitive market.

Management for labour market development and training has been transferred to the province from the federal government. This transition is well under way in Saskatchewan. STEC remains committed to working closely with all levels of government responsible for labour market development to ensure training programs are cost-effective, accessible and results-oriented. STEC industry standards and certification have become a model across a number of sectors, including apprenticeship training.

Primary Products

- National Certification
- Tourism Apprenticeships
- Standards-based training materials
- Saskatchewan Best customer service workshops
- It's Good Business responsible alcohol service workshops
- Career Awareness programming
- Tourism Careers for Youth program

OCCUPATIONAL STANDARDS AND CERTIFICATION AVAILABLE IN SASKATCHEWAN

Occupation (*national)	Standards Available	Certification Available
Food and Beverage Server*	√	√
Foodservice Manager*	√	√
Advanced Foodservice Manager*	√	√
Banquet Server*	Uses FBS	√
Bartender*	√	√
Beverage Services Manager	√	√
Front Desk Agent*	√	√
Housekeeping Room Attendant*	√	√
Guest Services Attendant*	√	√
Reservation Sales Agent*	√	√
Counter Sales*	Uses RSA	√
Kitchen Helper*	√	
Line Cook*	√	
Professional Cooking*	√	
Catering Manager	√	
Wine Service*	√	√
Sales Manager*	√	√
Director of Sales and Marketing*	√	√
Local Tour Guide*	√	√
Tourism/Visitor Information Counsellor*	√	√
Tourism/Visitor Information Supervisor*	√	
Travel Counsellor Entry* (ACCESS)	√	√
Special Events Coordinator*	√	√
Special Events Manager*	√	√
Meeting Planner*	√	
Meeting Manager*	√	
Taxicab Driver*	√	√
Tour Director*	√	√
Tour Operator*	√	
Small Business Owner/Operator*	√	
Ski Area/Resort Occupational Guidelines	√	
Campground Operator*	√	√
Golf Club General Manager*	√	
Supervisory Skills*	√	
Tourism Region Manager	√	√
Door Staff	√	
Outdoor Guide Core Skills*	√	
Freshwater Angling Guide*	√	√
Hunting Guide*	√	√
Heritage Interpreter*	√	√
Tourism Trainer*	√	√
Casino Dealer*	√	planned
Slot Attendant*	√	planned
Snowmobile*	√	
Retail Sales Associate*	√	planned
Entry Level Job Skills*	√	
Using Standards for Training	√	

4

IV. MEMBERSHIP AND VISITOR SERVICES

MEMBERSHIP

Background

Tourism Saskatchewan has an industry-wide mandate and therefore represents the entire tourism industry. A membership program has been developed whereby members pay for a package of specific benefits.

"I received a travel information package about a week ago. I was at the home and garden show in Calgary and requested the information and I have to say that it was the best package of information that I have ever received. We are planning extensive trips to Saskatchewan this summer because of it."
- Andrea Watson, Calgary, AB

Integrated Membership Structure

Tourism Saskatchewan and the provincial tourism regions have developed an integrated membership program to benefit the tourism businesses and organizations in the province. All members of tourism regions (including individual organizations and enterprises, municipalities, destination tourism associations, tourism corridor associations and tourism or convention bureaus) automatically become members of Tourism Saskatchewan. This system supports the tourism regions and simplifies the membership procedure for everyone.

Tourism Saskatchewan has worked with the tourism regions to establish standardized membership criteria, rate structure and benefits across the province and to allow for integrated buy-in at all three levels (city DMO, regions, province). Members joining a city destination marketing organization also become members of regions, and that membership provides membership to Tourism Saskatchewan.

Direct membership in Tourism Saskatchewan is available for organizations beyond the individual enterprise/bureau/municipal level, such as organizations or associations which are provincial in scope, and departments or agencies of the Government of Saskatchewan or Government of Canada.

Members representing designated organizations (which hold board seats), as described in the Tourism Authority Act, are automatically members of Tourism Saskatchewan.

Current Membership

Following the merger with the Tourism Industry Association of Saskatchewan in 1996, Tourism Saskatchewan had a total of 1,004 members. As of June 1, 2000, Tourism Saskatchewan's individual membership total has grown to 1,909. (See chart, page 52.)

Membership Advisory Council

To ensure that the programs and services offered by Tourism Saskatchewan address the needs of the tourism industry, an advisory council was formed in 1996 to provide input into the directives, plans and strategies for Membership Services (see Appendix 2 for listing of Advisory Council Members).

On the advice of the Membership Advisory Council and the needs identified by tourism business operators, Tourism Saskatchewan has developed a comprehensive membership benefits program.

THE VALUE OF MEMBERSHIP

Membership in Tourism Saskatchewan includes many important benefits, the most important being the ability to vote and participate in decision making. Members are able to elect individuals to the Board of Directors who help guide the direction of tourism for the benefit of the whole province. There are many other benefits of membership in Tourism Saskatchewan including the following:

Benefit	Approximate Value
• Free Distribution of Brochures at Visitor Reception Centres - prominent brochure display at the five Tourism Saskatchewan Visitor Reception Centres	**$50**
• Tourism Saskatchewan Travel Literature - preferred member rates for listings in the Saskatchewan Vacation Guide, Saskatchewan Accommodation, Resort and Campground Guide and Saskatchewan Fishing and Hunting Guide (save 50% compared to non-member rates)	**$50 - $180**

Benefit	Approximate Value
• Travel Literature Advertising Discount - 15% discount offered to Tourism Saskatchewan members on display ad rates in highly-regarded travel guides. Rates depend on size, placement and circulation of the particular guide.	**$35 - $1450**
• Internet Linkage to Tourism Saskatchewan's Home Page	**$50**
• Going Places - information newsletter with current material on important issues and tourism trends relevant to business planning.	**$60**
• Image Bank - access to extensive collection of images for tourism promotional purposes offered to members at a special member rate. Standard rates charged by stock image banks for one-time use of a photo for brochure publication range from $50 to $500 depending on the image and the application.	**$50 to $500**
• Tourism Research Services - a range of research services provided at member rates. - visitor and market profiles, survey design and analysis, product/market reports, economic impact analyses.	**$25 - $7500**
• CTRI Travel Exclusive subscription for only $99 (regular price is $379)	**$280**
• Hotel/Motel Room Preferred Rates - participating hotels/motels offer special member rates - two nights in a participating property could save members more than $50.	**$50 - $100**
• Member Rates for Conferences and Workshops - members realize savings of up to 50%	**$150**
• STEC Training Programs - depending on the program utilized and the number of participants trained, members can save up to $200 or more.	**$50 - $200**
• Membership Directory and Buyer's Guide - annual directory of all Tourism Saskatchewan members plus other key contacts; an excellent resource for purchasing or offering products and services - members receive free directory including two complimentary listings	**$30**

Benefit	Approximate Value
• MasterCard Merchant Discount (Bank of Montreal) - member rate of 2.1%, compared to 4-6% rate many small businesses pay - on MasterCard sales of $10,000/year or $27.40/day, members can easily save $200	**$200**
• Visa Merchant Discount (TD Bank) - member rate of 2.75%	**$200**
• Esso Discount - 1.8% savings on fuel at the pump, top-up fluids and car washes - $42 savings a year on a weekly fuel expenditure of $45	**$42**
• PrintWest Savings - 2.5% member discount on print jobs - additional 2.5% credit on future Tourism Saskatchewan marketing expenses	**$500**
• Group RRSP Discount through Investors Group - no administration, start-up or acquisition fees - plans customized for groups of any number	**$50 - $100**
• Sterling Newspaper Group Discount - reduced member rates for ads in tourism-specific supplements	**$200**
• Displayco Preferred Rates - 10% reduction on display graphics and services	**$100**
• CAA Waiver of New Member Fee	**$5**
• Customs Brokerage Service Preferred Rates - pay minimum flat rate to ship across the U.S. border	**$5** **$7 - $41**
• Invitations to Member Meetings and Events	
Tourism Saskatchewan Membership Value	**$2,184 - $11,938**

As indicated, these benefits can be worth more than $2,184 to Tourism Saskatchewan members. In summary, Tourism Saskatchewan is implementing a membership program that is simple and based on the business needs of its members. It contributes value and sustainability to tourism regions, and brings tourism businesses together to voice industry issues and concerns.

"Your Accommodation Guide is invaluable and your map easy to read. Your Vacation Guide is excellent, with information for all tastes. I also like the way your have divided the province into regions. And thanks for the list of golf courses!"

- Grace Morrison, Lynnwood, WA

VISITOR SERVICES

Background

Through direct contact with visitors to Saskatchewan, Tourism Saskatchewan strives to meet and exceed customer expectations through quality service and products. Tourism Saskatchewan provides travel counselling and reservation services to visitors through its extended-hours Call Centre, its network of Visitor Reception Centres (VRCs), and the production and distribution of the Tourism Saskatchewan travel literature series. The Call Centre utilizes toll-free telephone lines that cover North America. The VRCs operate seasonally and are strategically located near border entry points at Fleming, Langenburg, Lloydminster, North Portal and Maple Creek.

Inquiries to the Call Centre are all tracked through a Customer Database System, which provides customer profile information and feedback on marketing. In 1999, a record number of inquiries were processed: telephone calls, faxes, e-mails, Internet inquiries, ad coupons and letters totalling more than 453,000, a 67% increase over the previous year. Advanced technology is used in the Call Centre in the form of an Automatic Call Distributor and Perimeter Telephone Software which allow for call sequencing, line dialed identification and statistical tracking of call data.

A Central Reservation Service (CRS) is used within the Call Centre to process individual traveller reservations and to book rooms for conferences and special events. This service has been used for conference registrations and ticket sales in the past. Direct dial telephones in the Visitor Reception Centres allow travellers immediate access to certified Travel Counsellors, who confirm reservations at over 160 properties throughout the province. As a commission based system, the CRS allows properties of all sizes to compete for reservations without the additional cost of individual toll-free lines or annual fees.

The Visitor Reception Centres cater to the traveller to and within the province by providing on-site travel counselling and literature distribution. Merchandise continues to be sold at these locations to increase visitor awareness of Saskatchewan product through Saskatchewan logoed merchandise. The Visitor Reception Centres serve over 80,000 visitors per year at the five locations.

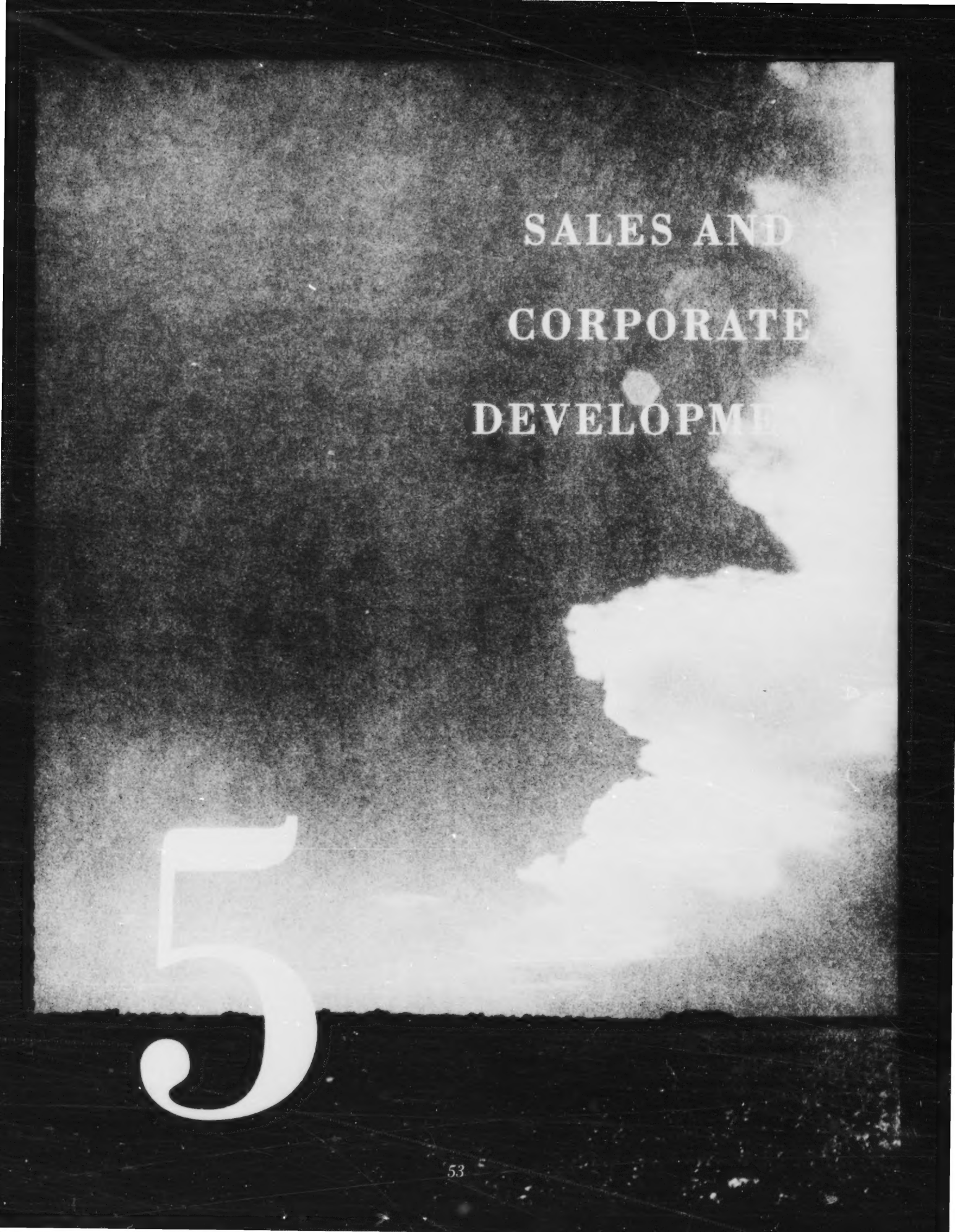
The 2000 travel literature series consisted of the *Saskatchewan Vacation Guide*, the *Saskatchewan Fishing and Hunting Guide*, the *Saskatchewan Accommodation, Resort and Campground Guide*, the *Saskatchewan Golf Tour Guide* and the *Official Saskatchewan Road Map*. The on-line events calendar was launched in 2000, recognizing the growing trend toward accessing information on-line. The Information Collection Unit within the Call Centre collects data on an annual and on-going basis to maintain an industry database. The content of this database is used for the printed travel literature series, on-line information on the Tourism Saskatchewan web site and for travel counselling in the Call Centre. An inclusion in mailed travel literature packages solicits feedback on the publications to allow for continual improvement.

BREAKDOWN OF TOTAL MEMBERSHIP BY SECTOR AND TRAVEL REGION

	SOUTHWEST	SOUTHEAST	WEST CENTRAL	EAST CENTRAL	NORTH	REGINA	SASKATOON	UNASSIGNED	TOTAL
1a	15	13	5	15	3	16	16	0	**83**
1b	4	5	7	13	5	4	3	0	**41**
1c	40	33	31	47	51	27	28	0	**258**
1d	5	2	3	23	81	0	4	0	**118**
2a	21	19	15	38	19	27	27	0	**166**
2b	28	14	21	15	1	19	27	0	**125**
3	9	1	6	4	1	9	13	0	**43**
4a	23	4	0	19	5	66	23	0	**140**
4b	0	0	0	2	0	5	10	0	**17**
5a	13	5	4	8	0	22	19	0	**71**
5b	2	2	1	4	1	8	2	0	**20**
5c	24	11	0	50	7	78	28	0	**198**
5d	4	0	0	2	2	8	10	0	**26**
6a	0	0	0	0	5	6	8	0	**19**
6b	0	0	0	1	0	11	10	0	**22**
7	2	1	0	6	1	14	9	0	**33**
8a	13	4	1	22	4	106	73	9	**232**
8b	1	0	0	2	0	0	4	0	**7**
8c	1	0	0	0	2	2	3	2	**10**
8d	3	3	0	5	5	15	8	3	**42**
8e	0	1	0	10	0	1	5	0	**17**
9a	26	16	21	22	2	4	1	0	**92**
9b	2	3	3	8	6	3	2	0	**27**
10	5	3	6	3	2	3	2	0	**24**
11	4	2	2	3	4	1	1	0	**17**
12	0	0	0	0	0	2	6	37	**45**
13	0	0	0	0	0	0	0	16	**16**
	245	**142**	**126**	**322**	**207**	**457**	**343**	**67**	**1909**

Sector Key

1. Accommodation
   - a. Bed & Breakfast, Vacation Farm, Guest Ranch
   - b. Campgrounds, RV Parks
   - c. Hotels, Motels, Resorts, Cabins
   - d. Outfitters
2. Attractions
   - a. Adventure/Recreation
   - b. Heritage/Cultural
3. Events
4. Food & Beverage
   - a. Restaurants, Pubs
   - b. Convention/Banquet
5. Retail
   - a. Antique, Souvenir, Gift shops
   - b. Gas, Service Stations
   - c. Stores (grocery, hair salon, pharmacy)
   - d. Shopping Centres, Malls, Department Stores
6. Transportation
   - a. Air, Bus, Rail Service
   - b. Taxi, Car Rental, Limo Service
7. Travel Trade - Travel Agencies, Tour Operators
8. Professional
   - a. Business Services, Corps, Suppliers
   - b. Education and Training
   - c. Individuals
   - d. Media
   - e. Service Clubs
9. a. Municipalities and RMs
   - b. REDAs, Rural Development Corps, Bands/Tribal Councils, Chambers of Commerce, Metis Locals
10. Tourism Bureaus, Travel Corridors, DMOs
11. Tourism Administrative Regions
12. Provincial Associations & Organizations
13. Government (Federal, Provincial, Aboriginal)


SALES AND
CORPORATE
DEVELOPM
5

V. SALES AND CORPORATE DEVELOPMENT

Background

Tourism Saskatchewan's Sales Division is responsible for selling Tourism Saskatchewan products and services to industry and non-traditional partners. These products and services include advertising in the annual travel literature series, *Membership Directory and Buyer's Guide*, and *Golf Guide*, as well as co-op advertising, direct mail campaigns, Internet advertising and vertical fulfilment programs.

Corporate Development is responsible for developing partnerships with organizations not traditionally associated with tourism. These alliances are formed to benefit all partners involved. The tourism industry crosses over, in numerous ways, into virtually all other economic sectors. Thus, partnerships of this nature are not only beneficial, but also logical. In 2000, Tourism Saskatchewan will continue to grow its list of partnerships and official suppliers. The search for partners is based on the following criteria:

- Ability to supply a member benefit
- Provide a benefit to tourism overall
- Enable Tourism Saskatchewan to market Saskatchewan more efficiently
- Improve the awareness and image of Saskatchewan and its tourism industry

This department is an important line of communication between industry stakeholders and Tourism Saskatchewan, and a vital link for profiling new marketing opportunities and products. Industry participation in the many co-op opportunities, partnerships and services offered by Tourism Saskatchewan provides an effective and cost-efficient means for tourism operators to promote their businesses and to increase their profits.

Products and Services

Following are descriptions of the key products and services currently available from Tourism Saskatchewan:

Tourism Saskatchewan Travel Literature Series

Tourism Saskatchewan's travel literature series, produced annually, is the cornerstone of the organization's advertising program. The publications are distributed in direct response to inquiries received by Tourism Saskatchewan through its Call Centre and network of provincial Visitor Reception Centres, and are also distributed through community information centres, consumer and travel trade shows, and major events in primary tourism markets. Our research tells us that these publications have a three-year shelf life, and that one in every three readers purchase goods or services advertised.

- The *Saskatchewan Vacation Guide* is Saskatchewan's official full-colour, all-season travel guide, highlighting tourism attractions, events and vacation packages for every major product area and tourism region of the province. This guide is the number one choice of both the inquisitive traveller and the knowledgeable advertiser. Two hundred thousand copies are produced for distribution by February.

- The *Saskatchewan Fishing and Hunting Guide* provides useful information on fishing and hunting, and includes a directory of nearly 200 outfitters. This is the perfect advertising vehicle for outfitters, sporting goods and equipment suppliers, transportation and tour companies, and many businesses that share the demographics and psychographics of this market segment. One hundred thousand copies are produced in November.

- The *Saskatchewan Accommodation, Resort and Campground Guide* is a comprehensive directory of hotels/motels, bed and breakfasts, parks, campgrounds, lakeside resorts and country vacation farms and ranches. One hundred and fifty thousand copies are produced in December.

- The *Official Saskatchewan Road Map* offers a detailed map face, supported by easy-to-use keys and indexes. This is a strong marketing tool, offering opportunities to advertise travel-related products and services. Fifty thousand copies are produced in January.

- The *Saskatchewan Golf Guide* is a convenient pocket guide that includes detailed information, advertising and golf packages from more than 70 Saskatchewan golf courses. Thirty thousand copies are produced and distributed in May.

Co-op Advertising and Direct Mail Campaigns

Nearly one million direct mail pieces are sent out into targeted vertical markets. These strong, high quality pieces are extremely cost-effective and are excellent vehicles for industry to reach their markets. Direct mail opportunities include:

- Alberta and Manitoba direct mail
- Fishing direct mail
- U.S. direct mail
- Canadian direct mail
- RV direct mail

Internet Banner Advertising

This relatively new medium offers advertisers the advantage of capturing inquiries to Tourism Saskatchewan directly to their web site.

Partnership Member Benefits

The variety of existing partnerships fostered by Tourism Saskatchewan has resulted in the following member benefits:

- Preferred credit card and direct deposit rates
- Discounts and marketing rebates on print products
- Discounts on tourism related newspaper and radio advertising
- Discounts on signage and display materials
- Waiver of new member fee for motor club

2000/2001 SALES AND CORPORATE DEVELOPMENT PLAN

Tourism Saskatchewan employs an active sales force, selling multiple or stand-alone products and services, developed by industry for industry. The team will play an active role in attracting both industry and non-traditional partners to participate in these opportunities for their mutual benefit. The growth of revenue depends on new business development. The increased need for advertising revenues can be met only by attracting more non-traditional partners and national corporate advertising.

Department Vision

- To become industry's advisers and advertising brokers.
- To increase industry participation in the Central Reservation Service.
- To increase both tourism industry and non-traditional investment in the various products and services now available through Tourism Saskatchewan.
- To contact industry in an efficient and effective manner regarding the opportunities for participation in Tourism Saskatchewan programs.
- To identify and obtain national corporate advertising clients.
- To network with existing partners to find new partnerships.

Communication

The key objective for 2000/2001 is to maintain the awareness of all products, services, marketing, and partnership opportunities that are available to industry and create greater awareness and participation among non-traditional partners.

Current communication initiatives include:

- Direct selling
- Travel literature rate card
- Direct-mail campaigns to industry and non-traditional prospects
- Individual faxing of a program or opportunity to regions/members
- Telemarketing
- Trade and consumer shows
- *Going Places* newsletter published bimonthly by Tourism Saskatchewan
- Partnership Opportunities Catalogue
- CARD (Canadian Advertising Rates & Data)
- Keeping the regional marketing contacts totally informed and up to date on all initiatives
- Chambers of Commerce memberships
- Large and small group meetings and presentations

VI. COMMUNICATIONS

Background

Tourism today is the world's leading industry in terms of overall contribution to the global economy. It's also a key economic sector and one of the most exciting and dynamic industries in Saskatchewan. In fact, tourism is Saskatchewan's fastest-growing industry and fourth-largest export industry, contributing more than $1 billion annually to the provincial economy and employing one in every 11 Saskatchewan workers.

Communications Goals

The Communications department strives to:

- Inform Tourism Saskatchewan's stakeholders/audience of the many economic and social benefits tourism brings to the province, and to reinforce its importance to the growth and positive image of Saskatchewan.

Stakeholders/Audience includes:

- Saskatchewan's tourism industry;
- The provincial government;
- Out-of-province groups such as the federal government, the CTC, and the travel trade;
- Provincial media;
- The general public;
- The non-tourism business community.

- Foster communication regarding tourism events, activities and programs among tourism industry and non-traditional partners, the public, media, government and out-of-province agencies.
- Clearly define the corporate identity, mandate and objectives of Tourism Saskatchewan for the tourism industry, government, media, public and the non-tourism business community, and communicate information on our activities and the programs and services we offer.
- Reinforce Saskatchewan's image as a beautiful, safe, unique and interesting tourism destination, rich in history, culture and ecotourism opportunities and with hundreds of exciting and unique attractions and events to discover, to residents and non-residents alike.

Implementation

There are many ways by which the above Communications goals will be fulfilled, including the following activities which may apply to all or some of Tourism Saskatchewan's identified audience:

- Publish Tourism Saskatchewan's magazine *Going Places* bimonthly and distribute to industry members and partners, government and media, as well as to those requesting copies;
- Host news conferences and/or distribute news releases province-wide regarding specific tourism-related activities, events and information;
- Respond promptly to media inquiries;
- Respond, if deemed necessary, to media stories, letters to the editor, editorial cartoons, etc. stating Tourism Saskatchewan's viewpoint;
- Continue to work with Saskatchewan media to encourage them to carry tourism-related stories, editorials and features;
- Correspond regularly with all Saskatchewan MLAs to keep them abreast of events, activities and successes in the tourism industry;
- Publish Tourism Saskatchewan's Business and Strategic Marketing Plan annually, detailing the organization's goals and objectives for the future;
- Publish Tourism Saskatchewan's Annual Report, summarizing the activities and accomplishments of the preceding year;
- Inform media, government and the general public about, and work with the regions and community tourism organizations in celebrating, Tourism Awareness Week annually in June;
- Coordinate speaking engagements for Tourism Saskatchewan staff and Board of Directors, at events held by traditional industry partners and non-traditional partners;
- Host annual Town Hall Meetings for industry and the general public to discuss tourism issues;
- Host an annual general meeting;
- Include messages promoting special events, accomplishments, etc., on fax cover sheets and e-mails originating from Tourism Saskatchewan;
- Issue internal memos and e-mails and hold regular staff meetings to inform Tourism Saskatchewan staff of projects, issues and activities affecting them;
- Work closely with all Tourism Saskatchewan departments on their communications materials to ensure quality and consistency of the messages being delivered;
- Provide writing, editing and production support to publish the Saskatchewan travel literature series annually;
- Provide a source of quality Saskatchewan images for internal and external use.

Conclusion

With the increasing importance of and focus on tourism in our province, it is vital that Tourism Saskatchewan establish a strong presence and identity, to most effectively represent and promote Saskatchewan's tourism industry to its partners and stakeholders, including the government, media, public and business community. The fulfillment of the above-mentioned communications initiatives will be instrumental in achieving that goal.

AI ATION

VII. FINANCE AND ADMINISTRATION

Introduction

Finance and Administration supports the corporate accountability of Tourism Saskatchewan's operations. The department is responsible for ensuring that the financial and administrative systems and policies are in place to ensure efficient, cost-effective performance across the organization and to assist Tourism Saskatchewan in achieving its business goals and objectives.

Finance and Administration supports the operations through the components of Financial Administration, Information Technology, Human Resources, and facilities and materials administration.

Financial Administration

Operating in a limited funding, non-profit environment creates significant pressure to operate with greater efficiency and focus on improved cost structures over the long-term. Currently, and in the years to come, all departments of the organization will continue to engage in costs containment and process improvement measures specific to their operating plans. Through its strategy of growth (meeting a wide-range mandate) and improved operational efficiency, the organization will continue to deliver value to the tourism industry while providing quality service.

Financial Administration focuses on financial systems for maintaining accurate, complete, useful and timely financial information relevant for key decision-making. It provides the corporate leadership for financial business planning and integrates this with financial and materials management into a comprehensive approach to service delivery. Strong financial systems, policies and procedures, linked with all departmental directors being held accountable for their departmental financial management and program delivery, provides a sound environment to operate with fiscal responsibility.

Information Technology

Tourism Saskatchewan is committed to the development and maintenance of the knowledge and experience necessary to successfully utilize technology to improve Saskatchewan's profile and awareness as a tourism destination to provincial, national and international travelers.

The IT unit is responsible for operational support, application development and technology planning to ensure it supports Tourism Saskatchewan and the tourism industry's current and future business strategies. It ensures staff are using the most relevant technology necessary to perform their responsibilities effectively and efficiently.

Of primary importance is Tourism Saskatchewan's commitment to the significance of the Internet and the tremendous impact it currently has and will expand to for enhancing Saskatchewan's profile and awareness as a tourism destination. Significant achievements have been realized since early 1997 leading to dramatic increases in on-line visitations to the organization's award-winning web site. Impressive conversions of web inquirers leading to actual visits to Saskatchewan have been achieved. Tourism Saskatchewan's multi-year technology objectives will provide a comprehensive and fully web-enabled data source, which will meet advertising and tourism promotion, research and Internet-based travel fulfillment and information based inquiry needs.

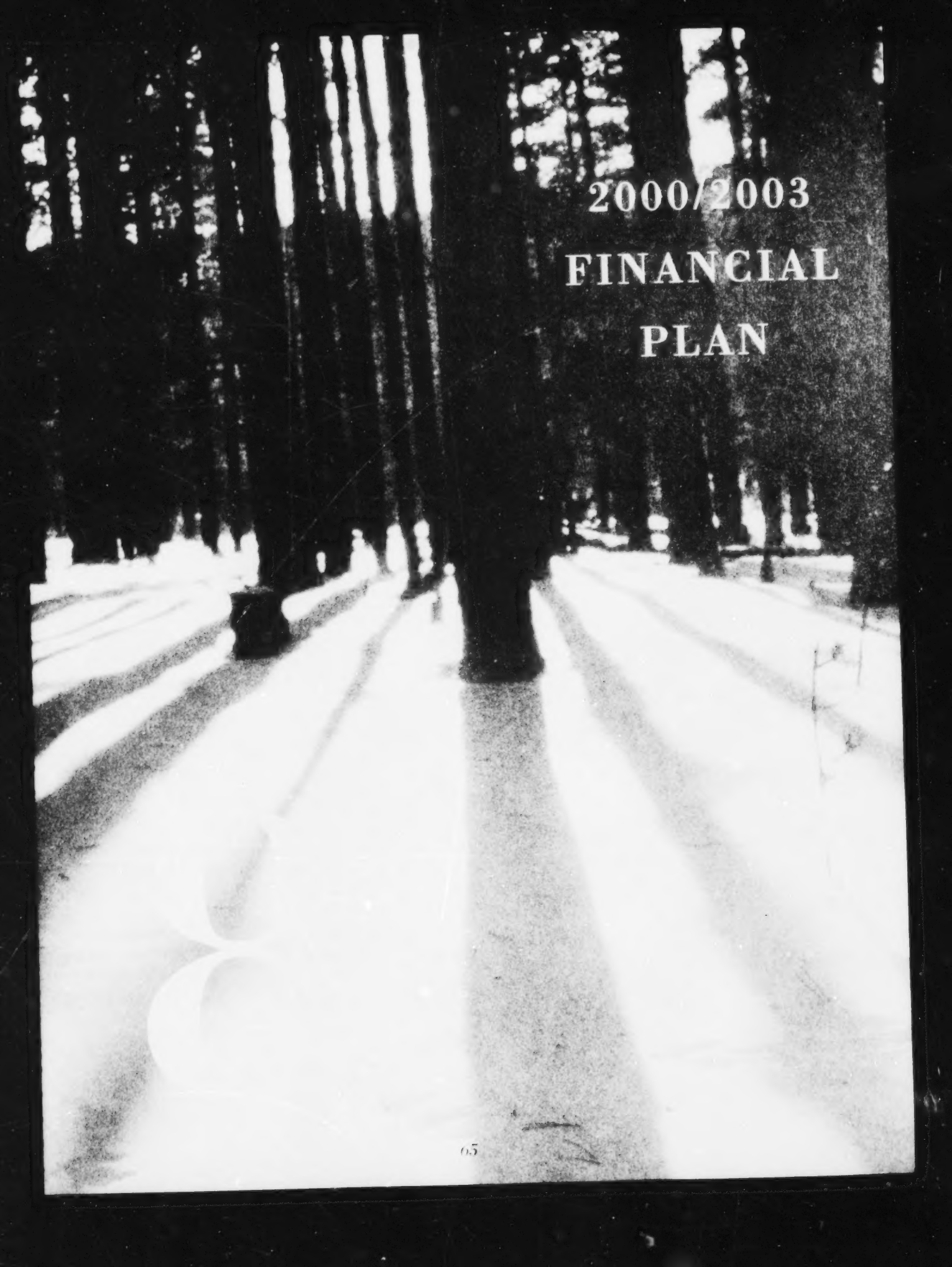
Human Resources

Tourism Saskatchewan is successful due to the motivation and creativity exhibited by its human resources. Management by results and the publication of those results give personnel reinforcement and increase their pride in belonging to the organization. Tourism Saskatchewan recognizes the value of its employees and favors management mechanisms that open doors to the creative ideas of the employees. The results of Tourism Saskatchewan's continuous improvement and learning culture lead to quality service to our clients and partners and a healthy work environment for our employees.

The human resource activities include recruitment, human resource administration and labour relations. Efforts focus on the administration of these activities and ensure the consistent application and adherence to human resource policies and procedures. It is recognized that dedicated financial resources are necessary to support internal training and development opportunities.

Financial Plan

Tourism Saskatchewan's three-year financial plan, commencing with the fiscal year ending September 30, 2001, follows. The financial plan represents the start of the second and future years of a multi-year recovery plan reacting from the deficit results of the 1998/99 fiscal year.


2000/2003
FINANCIAL
PLAN

2000/2003 FINANCIAL PLAN *

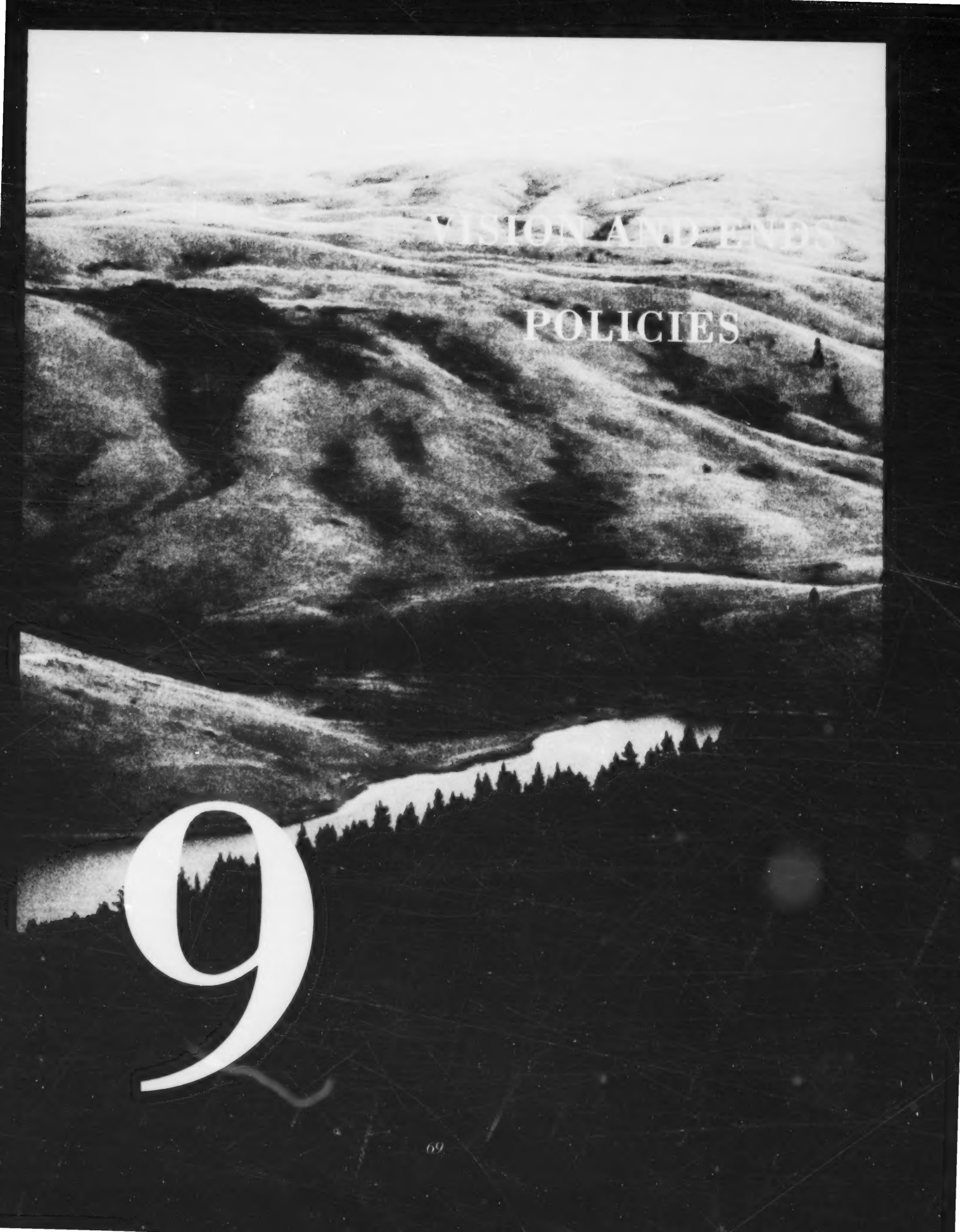
TOURISM SASKATCHEWAN THREE YEAR STATEMENT OF OPERATIONS

OCTOBER 1, 2000/SEPTEMBER 30, 2003

	2000/2001	2001/2002	2002/2003
Revenue			
Operating Grant - Province of Saskatchewan	$ 6,915,000	$ 6,915,000	$ 6,915,000
Industry I/K Contributions	2,402,000	2,500,000	2,600,000
Education and Training	859,981	860,000	860,000
Partnership Marketing Program	844,000	850,000	850,000
Advertisements and Product Sales	578,195	605,000	630,000
Corporate Sponsorships	263,250	275,000	290,000
Other Grants and Contributions	87,500	90,000	90,000
Partnership and Co-op Revenue	125,200	140,000	160,000
Tourism Saskatchewan Memberships	46,000	50,000	55,000
Consulting Services	7,000	8,500	10,000
Commission Revenue	15,550	20,000	25,000
Miscellaneous Revenue	10,800	12,000	12,000
Total Revenue	$12,154,476	$12,325,500	$12,497,000
Less Cost of Goods Sold	85,353	91,000	97,000
Gross Margin	$12,069,123	$12,234,500	$12,400,000
Expenses			
Wages and Benefits	$ 3,029,752	$3,156,000	$ 3,218,000
Contractual Services	582,582	590,000	595,500
Advertising	4,260,045	4,300,000	4,406,500
Print	764,656	748,000	741,000
Other Marketing Related Expenses	728,561	728,500	729,000
Travel	415,713	421,000	424,000
Space and Equipment Rental	340,000	345,000	345,000
Depreciation	225,000	225,000	225,000
Supplies and Services	105,973	105,000	105,000
Interest and Bank Charges	61,000	56,000	51,000
Provision for Bad Debts	10,000	10,000	10,000
Partnership Marketing Program Payments	1,444,100	1,450,000	1,450,000
Total Expenses	$11,967,382	$12,134,500	$12,300,000
Excess of Revenue over Expenses	$ 101,741	$ 100,000	$ 100,000
Unrestricted Net Assets, Beginning of Year	(331,398)	(229,657)	(129,657)
Unrestricted Net Assets, End of Year **	$ (229,657)	$ (129,657)	$ (29,657)

* As at July 2000.

** Under the assumption that the annual investment in Capital Assets approximates annual Depreciation expense



9

VISION AND ENDS

POLICIES

VISION AND ENDS POLICIES

Tourism will be a vital, growing and sustainable economic sector.

Tourism Saskatchewan exists so that there will be:
I. Well-developed tourism markets in areas of strength.
II. Opportunities for greater profits and employment within the tourism industry.
III. Greater product diversity, including opportunities for authentic natural, cultural, and historical tourism experiences.
IV. A Saskatchewan population knowledgeable and supportive of tourism.
V. Effective support structures and relationships among tourism industry stakeholders.

I. "Well-developed tourism markets in areas of strength" means:
1. Out-of-province markets shall be a high priority.
2. Well-developed markets are those with:
- a strong product/market match
- competitive positioning
- satisfactory rate(s) of return on investment
- sustainable growth

3. Areas of strength are those:
- relevant to the consumer
- distinctive and/or unique enough to be a basis for competitive differentiation
- substantial enough to justify the required investment needed to generate a return
- sustainable over an extended period of time

4. Saskatchewan offers a high quality tourism product that is competitive in the appropriate target market.
5. Visitors provide positive word-of-mouth referral about Saskatchewan to others.
6. Visitors stay longer, spend more, and come again.

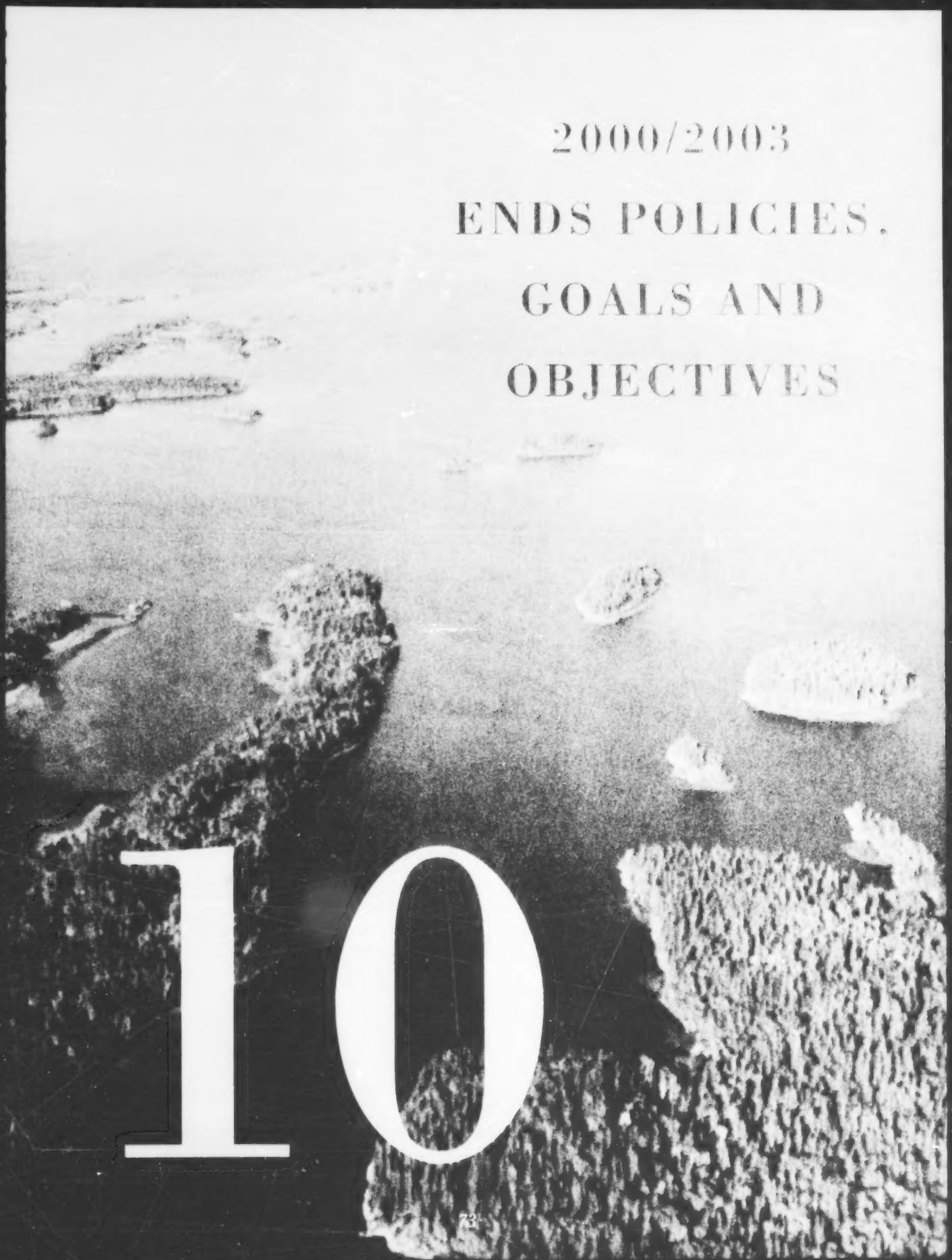
II. "Opportunities for greater profits and employment within the Saskatchewan tourism industry" means:
1. Profitability of the overall industry is paramount, not the profitability of individual operations or Tourism Saskatchewan itself.
2. Profitability should be long term and ongoing.
3. Tourism operators recognize that providing resources and means for education and training for themselves and their staff is recognized as an important means of enhancing the image and efficiency of the industry and thus its profitability.
4. A high priority will be placed on the industry having well-trained and knowledgeable tourism personnel, providing a high standard of service.

III. "Greater product diversity, including opportunities for authentic natural, cultural and historical tourism experiences" means:
1. Emerging products are an important component of the product diversity. Emerging products are those:
   a. where product and/or infrastructure is non-existent or in the early stages of development;
   b. which are perceived as growing and are strong candidates for becoming a mature product;
   c. which have markets that are clearly identifiable and have the potential for growth;
   d. which currently may have low visitation levels;
   e. which may have low awareness in the target markets;
   f. which have opportunities for developing a competitive, sustainable position in the target markets;
   g. which have opportunities for providing satisfactory rates of return on investment.
2. Existing products are recognized as part of our product diversity.
3. A high level of awareness of existing capital funding sources to facilitate expansion and product diversity.
4. Tourism industry operators are aware of the existence and circumstances under which alternative and unconventional capital formation and financing sources are available to them.
5. Opportunities for natural, cultural and historical tourism experiences:
   a. the preservation and conservation of authentic natural, cultural and historical resources for the use and enjoyment by future generations shall not be sacrificed in the pursuit of present-day tourism experiences;
   b. authentic natural, cultural and historical resources and products are identified;
   c. these experiences not be offered to tourists without the agreement and involvement of the owners and custodians of these resources;
   d. there is a clear understanding of how the tourist wants to experience authentic natural, cultural and/or historical tourism products.

6. Appropriate physical infrastructures are in place to support tourism products and visitor traffic.
7. Visitor services continue to improve and diversify.

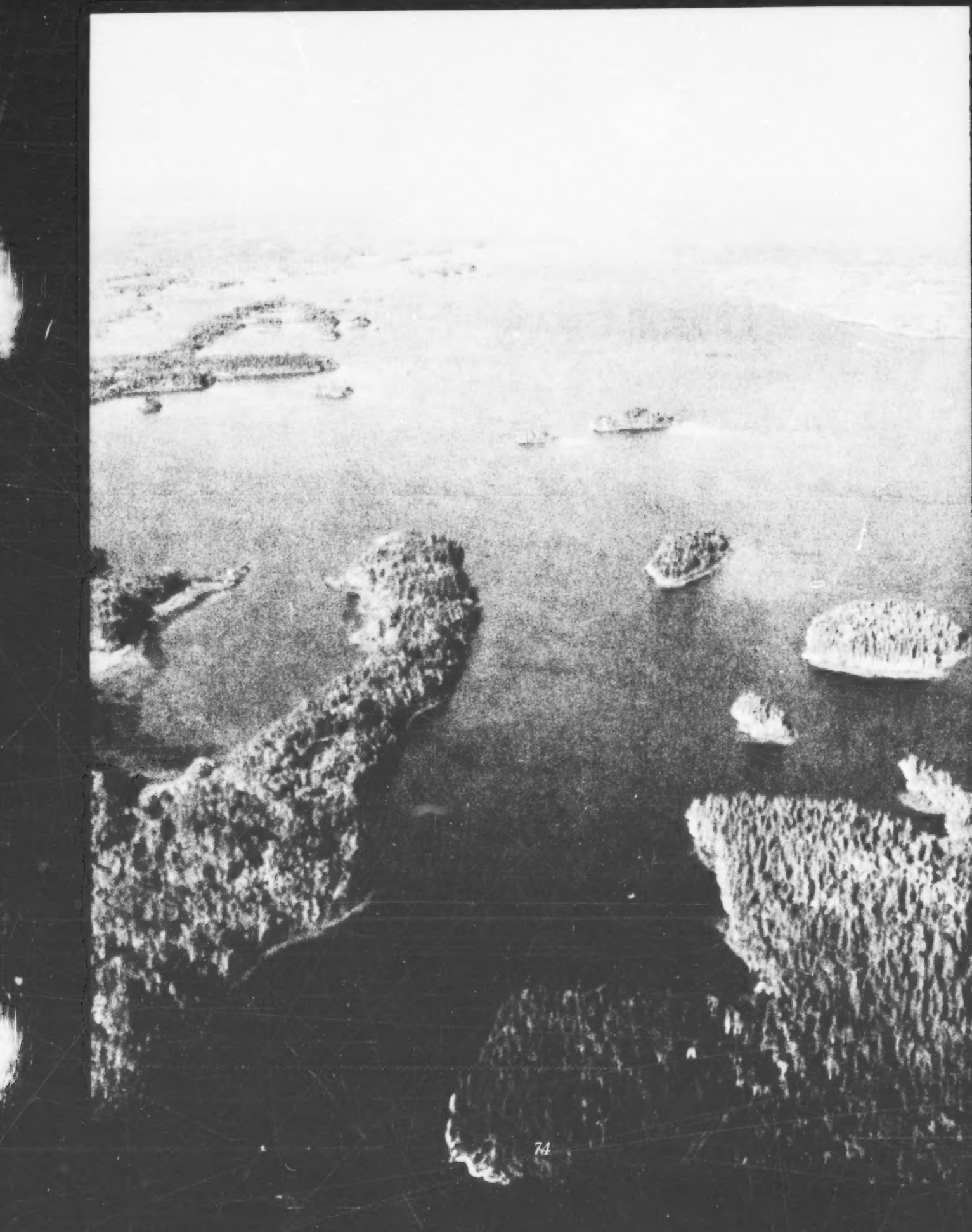
IV. "A Saskatchewan population knowledgeable and supportive of tourism" means:
1. A positive public policy climate exists for tourism.
2. Non-traditional partners participate in tourism programs and appreciate the benefits from tourism.
3. Legislators and regulators are aware of their role in tourism and the benefits of tourism.
4. The general public is aware of the benefits of tourism.

V. "Effective support structures and relationships among tourism industry stakeholders" means:
1. The tourism industry in Saskatchewan, and the government of Saskatchewan, are partners in, and the owners of, Tourism Saskatchewan.
2. Open, effective communications among the industry, all industry organizations, and the government regarding the ongoing development of a seamless, grassroots-oriented participatory tourism industry organization structure.
3. An environment conducive to effective partnerships.
4. Appropriate organizational structure, both geographic and vertical, to achieve the vision.
5. Tourism Saskatchewan will support these structures where they are efficient, sustainable and have the support of the industry grassroots.
6. Local tourism organizations can access consultative support and expertise provided by and through Tourism Saskatchewan staff.
7. Tourism Saskatchewan seeks the direct involvement of industry partners through membership.
8. Legislative climate favourable to tourism.



2000/2003 ENDS POLICIES, GOALS AND OBJECTIVES

10



X. 2000 – 2003 GOALS AND OBJECTIVES

INTRODUCTION

The following goals and objectives relate to the Vision Statement and Ends Policies (see page 71) established by Tourism Saskatchewan's Board of Directors.

Tourism Saskatchewan goals are shared by the organization and its industry stakeholders. All goals are intended to benefit the tourism industry, either directly or indirectly. While industry stakeholders will strive to achieve some goals collectively, Tourism Saskatchewan will lead in the efforts to achieve other goals.

Accountability in achieving goals will be shared. All stakeholders will respect the fact that external, non-controllable influences may be obstacles to success.

Under each Ends Policy, Tourism Saskatchewan has identified goals and objectives for achievement over the next three fiscal years, October 1, 2000 to September 30, 2003.

Goals provide a vision of where the tourism industry is moving, and help to further define the Ends Policies as described by Tourism Saskatchewan's Board of Directors. Goals are evaluated annually to determine their need and value in meeting industry's concerns. Unlike objectives, goals are not necessarily presented in measurable terms. The time frames represented are one to three years for mid-term goals, and over four years for long-term goals. Unless otherwise indicated, all goals identified are mid-term.

Objectives differ from goals in that they are specific, measurable and attainable. At the end of each fiscal year, Tourism Saskatchewan will be held accountable by its Board of Directors for the success of those objectives identified for completion within that time period.

Each 2000/2001 objective is followed by an explanation of the current position, a suggested strategy for achieving the objective, and the name of a key contact at Tourism Saskatchewan (refer to Appendix 3 for phone numbers and e-mail addresses).

ENDS POLICY 1: WELL-DEVELOPED TOURISM MARKETS IN AREAS OF STRENGTH.

Goal: Foster and support the development of in-bound tour packages for Saskatchewan, offering export, market-ready products to national and international markets.

2000/2001 OBJECTIVE:

1.1 Meet with a minimum of 30 industry partners to develop an additional 10 RV tour modules that can be used in customizing RV travel packages/itineraries by September 30, 2001.
(Contact: Kelly Brezinski)

Current Position:

Tourism Saskatchewan and its partners have been developing packages and itineraries for the senior RV market for the past four years. RV travel packages have been customized for RV tour companies and travel associations throughout the U.S.

Twenty-five modules have been developed for Saskatchewan, and we will continue to add and modify travel modules in the future. Research indicates a significant increase in the sale of RV units to seniors across North America, and during the next 10 years we expect a significant increase in the seniors' market. We must continue to develop packages to meet their travel demands.

Strategy:

a) Continue to meet with tourism operators to assess the inventory of tourism products and develop travel modules to meet the demands of the senior RV market.
b) Continue to participate in the Family Motor Coach Association (FMCA) marketplace to meet contacts that offer RV travel caravans and ensure that our modules meet their requirements.

2000/2001 OBJECTIVE:

I.2 Develop a minimum of two new group travel packages for the senior RV market by September 30, 2001.
(Contact: Kelly Brezinski)

Current Position:

Tourism Saskatchewan and its partners have been developing packages for the senior RV market for the past four years. During this very short period of time, we have been quite successful in attracting caravans from the U.S., mainly through the opportunities presented at the FMCA marketplace. In the past three years, we have seen an increase in the number of caravan packages developed by Tourism Saskatchewan and its partners, travelling to and through Saskatchewan (from two in 1998 to five in 2000).

As we witnessed at the 2000 marketplace, there are new travel groups being formed every year, some of them with huge membership bases. The potential for travel to Saskatchewan is high, and our success in attracting these groups here will be directly related to the product we present at the marketplace.

Strategy:

a) Continue to participate at the FMCA for 2001 in Oklahoma City and Redmond, Oregon.
b) Attend other RV/outdoor marketplaces in California and Minnesota.
c) Follow up with RV tour directors and associations made at previous marketplaces.
d) Meet with a minimum of 10 RV tour companies/RV travel directors.

2000/2001 OBJECTIVE:

I.3 By June 30, 2001, analyze and communicate information on travel motivators for a minimum of five key sectoral or geographic markets using a variety of means, including *Going Places*, general meetings and regional forums.
(Contact: Bonnie Baird)

Current Position:

In 1999/2000, Tourism Saskatchewan partnered with 13 other national tourism organizations to collect travel motivation information on United States and Canadian travellers. The data collection was complete in May 2000, and the partners have contracted the development of up to 15 reports on key market segments.

Strategy:

a) Continue participation in national ongoing surveys such as the Canadian and International Travel Surveys.
b) Through these surveys, evaluate Saskatchewan's 1999 and 2000 capture of key markets.
c) Extract key information from the partnered market survey and communicate it to operators and regions through seminars and articles in *Going Places*.

2000/2001 OBJECTIVE:

I.4 By September 30, 2001, add three new European and two new Asian tour operators carrying Saskatchewan product to our international trade portfolio.
(Contact: Ted Hornung)

Current Position:

Over the past five years, Saskatchewan has been developing programs with the international travel trade. In 1999, we had two European tour operators carrying programs offering agritourism and one Japanese company carrying home-stay programs. By 2000, those numbers increased to six operators in Europe and two in Asia. Increasing demand for Saskatchewan-based travel experiences from international companies currently doing business in western Canada suggests continued growth in this area.

Strategy:

a) Work with the regions and industry operators to increase the portfolio of market-ready packages.
b) Make direct sales calls on key tour operators in our primary European markets.
c) Attend Rendez-Vous Canada 2001.
d) Make direct sales calls to Asian tour operators based in Vancouver.

2000/2001 OBJECTIVE:

I.5 By September 30, 2001, develop two new guest ranch programs and five new home-stay packages for sale to the international travel trade.
(Contact: Ted Hornung)

Current Position:

Saskatchewan is recognized as a desired location for agritourism and home-stay programs. Tourism Saskatchewan continues to work with the regions and industry partners to develop programs that meet the needs of European and Asian tour operators. A consultative approach to outlining market opportunities and developing packages is required to encourage the development of new programs.

Strategy:

a) Develop a background paper on agritourism and home-stay programs, based on ongoing contact with the international travel trade, for circulation to industry partners.
b) Schedule at least three workshops to present market opportunities to industry and to begin the development of market-ready packages.
c) Draft itineraries for a minimum of seven new packages for review by August 31, 2001.

Goal: Increase return on investment for marketing initiatives through increased non-resident visitation and average visitor expenditures per trip.

2000/2001 OBJECTIVE:

I.6 Continue to work with the outfitting industry for input on developing partnership opportunities to increase the number of leads in the U.S. marketplace and to finalize the outfitters database strategy by September 30, 2001.
(Contact: Kelly Brezinski)

Current Position:

During the past few years, surveys were completed for the outfitting industry, primarily for fishing and hunting product. A strategy was developed, based on the information gathered from the surveys, utilizing an outfitter database, which assists the consumer by providing a list of properties that best suit their requirements. We will continue to develop and modify this strategy with the input of the Saskatchewan Outfitters Association and the outfitting industry.

Strategy:

a) Continue to develop contacts in the U.S. outdoor adventure marketplace through the outfitters database.
b) Update/modify the outfitters database as required.
c) Keep in contact with the outfitting industry for input and partnership opportunities in the market.
d) Survey the qualified contacts made at the marketplaces to determine whether they purchased a Saskatchewan outdoors package.

2001/2002 OBJECTIVE:

I.7 Work with industry, city and regional partners to attract the Family Motor Coach Association's International Convention and Trade Show to Saskatchewan by September 30, 2003.
(Contact: Kelly Brezinski)

2000/2001 OBJECTIVE:

I.8 By September 30, 2001, bring 12 new U.S.-based tour operators to Saskatchewan and ensure that three of them include Saskatchewan in their 2002 program.
(Contact: Dodie Litowitz)

Current Position:

At present, contacts have been made through the National Tour Association, American Bus Association and Dollars Due North functions. Tourism Saskatchewan is working with Canadian Tourism Commission Leisure contacts in targeted U.S. locations to gain CTC support for tour operator familiarization tours to Saskatchewan.

Strategy:

a) With the regions, co-host two small familiarization tours from the target states (Texas, Illinois, Wisconsin, Minnesota, Montana, Colorado, Washington State, and/or Oregon).
b) Arrange for the airfare costs to be offset by CTC support.
c) Continue to meet with operators and travel agents through NTA, ABA and DDN venues.
d) Participate in co-operative advertising in the NTA/DMO Directory and ABA Motorcoach Marketer to retain our visibility in the motorcoach markets.
e) Gain the full participation of industry through, for example, the provision of complimentary rooms, meals, etc.

2000/2001 OBJECTIVE:

I.9 By September 30, 2001, generate a minimum of $700,000 in unpaid media publicity, maintaining and enhancing the quality of tourism media publicity generated around the world in primary, secondary and developing markets for Saskatchewan.
(Contact: Gerard Makuch)

Current Position:

Tourism Saskatchewan maintains an ongoing media publicity program. In 1998/99, more than $1 million in unpaid media publicity was generated through support for 39 media trips to Saskatchewan and other editorial assistance. Results for 1999/2000 will be available later in the year.

Strategy:

a) Seek out, accredit and invite selected media on trips to Saskatchewan to explore our various events and attractions.
b) Attend the annual media marketplace coordinated by the Canadian Tourism Commission.
c) Expand resources available for this program through the development of greater involvement and partnership with the province's tourism regions and other industry partners.
d) Work with accredited media outlets in target markets to establish unpaid media publicity in conjunction with advertising and other marketing initiatives.

2000/2001 OBJECTIVE:

I.10 By September 30, 2001, increase expenditures by Alberta visitors by 3% and by Manitoba visitors by 2% over 1999 levels. (Contact: Steve Pearce)

Current Position:

In 1998, Alberta visitation for one or more nights increased by 17% over 1996 levels, with a corresponding increase of 24% in expenditures. One in five Alberta visitors chooses Saskatchewan for a vacation because of our lakes, resorts and parks. Research conducted in Alberta in 1997 and 1998 indicates a strong potential to capture Albertans looking for alternatives to traditional and overcrowded mountain destinations.

In 1998, Manitoba visitation for one or more nights increased by 4% over 1996 levels, but saw an 11% decrease in expenditures due to shorter length of stay and lower per trip expenditures. Manitoba is perhaps the most difficult market to influence due to their negative image of Saskatchewan. Manitobans account for 7% of all overnight or longer trips made by Canadians to other provinces and are very likely to travel to Alberta or British Columbia. Areas of opportunity for Saskatchewan include festivals/events, cities and golf product.

Strategy:

a) In partnership with operators and tourism regions, pursue a coordinated newspaper insert/direct mail promotion to select Alberta and Manitoba households.
b) In partnership with operators and tourism regions, ensure a significant Saskatchewan presence at select marketplaces in both provinces.
c) Seek Canadian Tourism Commission and/or non-traditional funding to expand the total marketing program.

2000/2001 OBJECTIVE:

I.11 By September 30, 2001, increase expenditures by short haul United States visitors by 3% over 1999 levels. (Contact: Steve Pearce)

Current Position:

In 1998, visitors from short-haul U.S. states (Montana, North Dakota, South Dakota and Minnesota) made 61,000 visits to Saskatchewan and spent $31 million, an increase of 15% over 1996 levels. Although most U.S. residents have little or no awareness of the exchange rate, those in short haul states have a higher than average knowledge and are more likely to be influenced by vacation opportunities related to a favourable exchange rate. The primary trip purpose of visitors from short haul states is outdoor opportunities such as fishing, golfing and camping, as well as city events and shopping.

Strategy:

a) In cooperation with operators and tourism regions, maintain use of direct mail and/or select media to qualified households.
b) Encourage development of value-added packages with industry partners.
c) Provide coordination support for tourism regions planning marketing activities in this market.
d) Attend a travel marketplace with group leaders and consumers in South Dakota with the potential of partnering with at least one region and providing the opportunity to have up to four operators buy in through brochure placement at the marketplace.
e) Work with interested Saskatchewan regions, cities and industry partners to develop a coordinated advertising promotion showcasing Saskatchewan product in short and medium haul U.S. destinations. Seek Canadian Tourism Commission funding to support this initiative.

2000/2001 OBJECTIVE:

I.12 By September 30, 2001, increase expenditures from long-haul United States visitors by 3% over 1999 levels. (Contact: Steve Pearce)

Current Position:

In 1998, there were 108,000 visitors from long-haul U.S. states (California, Colorado, Florida, Illinois, Indiana, Iowa Kansas, Michigan, Missouri, Ohio, Oklahoma, Oregon, Texas, Washington and Wisconsin). These visitors spent an estimated $73 million, an increase of 65% over 1996 levels. As the U.S. population ages and shifts southwards, the potential for increased interest in Saskatchewan products grows as well. Areas of interest to long-haul U.S. markets include touring, outdoor experiences, RV travel, water-based recreation, fishing, soft outdoor adventure, events, golf, cultural experiences and attractions, and winter experiences.

Strategy:

a) Maintain use of direct mail and/or select media to qualified households in the fishing, soft outdoor, RV and general touring markets.
b) Focus on outdoor and vertical markets with industry partners where possible.
c) Partner with the Tourism Alliance for Western and Northern Canada and the Canadian Tourism Commission where possible to enhance Saskatchewan's reach and coverage.
d) Focus marketplace activity in developing markets for outdoor and RV travel.
e) Continue database application at marketplaces that focus on providing consumers and trade with qualified listing of outfitters and/or packages.
f) Continue to develop web site and supporting advertising and media relations activities.
g) Further develop web banner advertising to reach key market segments.

2000/2001 OBJECTIVE:

I.13 Begin the development of a formal brand identity that will be adapted for use across all marketing campaigns by Tourism Saskatchewan and its partners, by September 30, 2001. (Contacts: Steve Pearce and Gerard Makuch)

Current Position:

A formal brand identity for Saskatchewan would help to establish a relationship between the destination and the consumer by conveying a value proposition that is expressive, meaningful and distinctive. Through the positioning of its product and the communication of its advertising messages, Saskatchewan has begun the process of branding. However, there is currently no formal branding strategy or signature for the province.

Tourism Saskatchewan has identified the creation of a provincial branding strategy as a significant economic development opportunity, and has recommended to the province that support be provided for the development of such a strategy. Our organization has offered to take the lead on this initiative.

Strategy:

a) Complete a review and analysis of the current Saskatchewan tourism brand.
b) Consider, develop and test some brand concepts as part of the 2001 campaign.
c) By 2002, commit to a long-term branding strategy for Saskatchewan as a tourism destination.

Goal: Increase the length of stay and expenditures of visitors by working directly with operators/travel agents to develop enhanced products and services.

2000/2001 OBJECTIVE:

I.14 By September 30, 2001, develop market-ready travel itineraries and enhance existing itineraries of at least eight operators who are currently carrying Saskatchewan product. (Contact: Dodie Litowitz)

Current Position:

Tourism Saskatchewan and its partners have worked in the travel trade and group market in the U.S. for the last four years. Packaging and itinerary planning is an ongoing project. At present, there are approximately 60 operators who include Saskatchewan in their programs.

Strategy:

a) Continue to meet with industry partners to develop market-ready travel itineraries to compliment their existing itineraries.
b) Continue to work with operators/agents in the U.S. and Canada through the Ontario Motor Coach Association, American Bus Association and National Tour Association.

2000/2001 OBJECTIVE:

I.15 Update the present Tour Planner's Manual with reprints completed by April 30, 2001. (Contact: Dodie Litowitz)

Current Position:

The Tour Planner's Manual is a comprehensive fulfillment piece targeted to the travel trade and used extensively for travel planning. The travel itineraries and listings of operators, attractions and services are provided on a regional and corridor basis, which is why it is imperative that the manual remains current.

Strategy:

a) Obtain regional support for the completion of this project.
b) Complete the data collection process by January 31, 2001.
c) Distribute the reprints to the 1,700 plus operators/agents who have a copy of the manual by September 30, 2001.

ENDS POLICY 2: OPPORTUNITIES FOR GREATER PROFITS AND EMPLOYMENT WITHIN THE TOURISM INDUSTRY.

Goal: Design and implement a variety of databases, for use by operators, tourism regions, sectors and Tourism Saskatchewan, to enhance and refine existing and potential customers' knowledge of Saskatchewan's tourism products.

2000/2001 OBJECTIVE:

II.16 By September 30, 2001, develop a compilation of packages on a regional/provincial basis that lists all of the Saskatchewan product opportunities available for sale. (Contact: Gene Lambert)

Current Position:

There is a need to coordinate and develop a compilation, or comprehensive listing, of packages to meet market demand. The compilation will become an important internal sales tool for regional and provincial marketing consultants.

Strategy:

a) Develop a template on the basis of demand/opportunities/market niches identified by Tourism Saskatchewan consultants by February 1, 2001.
b) Complete regional manager orientation/identification of potential packages and opportunities by June 30, 2001.
c) Conduct provincial/regional workshops on product packaging by June 30, 2001.
d) Update the information on an ongoing basis.

2001/2002 OBJECTIVE:

II.17 By September 30, 2002, upgrade and expand the database of travel media to ensure comprehensive listing of appropriate media, and a continuous and consistent system of communicating with these media. (Contact: Gerard Makuch)

2001/2002 OBJECTIVE:

II.18 Continue to review current database marketing practices and put in place a plan to enhance and improve direct marketing activities by September 30, 2002, for implementation in 2003. (Contact: Bonnie Baird and Steve Pearce)

Goal: Analyze and evaluate the effectiveness of new and developing Internet marketing and fulfillment tools to assist operators and Tourism Saskatchewan in improving the effectiveness of their use of these tools.

2000/2001 OBJECTIVE:

II.19 Analyze and evaluate the effectiveness of web banner advertising placed on commercial sites, by December 31, 2000 for those ads placed in 2000, and by September 30, 2001 for those ads placed in 2001. (Contacts: Bonnie Baird and Clint Krismer)

Current Position:

In 2000, Tourism Saskatchewan began placement of both product-specific and geographically- targetted banner ads on commercial web sites.

Strategy:

a) Through the development of a unique tracking system, track consumer response to each banner ad on an ongoing basis.
b) Through e-mail and other survey methods, estimate actual customer visitation rates.
c) Provide operators and regions with results in order to assist their purchase of web advertising.

2000/2001 OBJECTIVE:

II.20 By May 31, 2001, analyze the effectiveness of operator participation on Tourism Saskatchewan's web site on TourNet and provide a report to participating operators. (Contacts: Bonnie Baird and Clint Krismer)

Current Position:

Saskatchewan tourism operators are provided with access to web consumers via participation in TourNet, which provides links to operators' web sites based upon consumer interests. In the spring of 2000, Tourism Saskatchewan developed a mechanism to track visitors to each linked operator's site.

Strategy:

a) Using the tracking mechanism developed by Tourism Saskatchewan, track one year of activity for each type of operator participating on TourNet and provide participating operators with activity reports. Request that operators provide Tourism Saskatchewan with information on actual results.
b) Analyze economic value for participating operators.
c) Provide a general report on TourNet benefits and communicate the results through general meetings, *Going Places* and international forums.
d) The tracking deadline will be March 31, 2001.

2000/2001 OBJECTIVE:

II.21 Increase participation in the Saskatchewan TourNet World Wide Web program to a minimum of 550 distinct operators by June 30, 2001. (Contact: Clint Krismer)

Current Position:

The Saskatchewan TourNet World Wide Web program, launched in September 1997, has proven itself to be a valuable resource to both tourism operators and visitors. Current participation includes approximately 475 different businesses, organizations and associations. Participation must be increased to improve Saskatchewan's visibility and profile in this highly competitive new medium.

Strategy:

a) Host a minimum of four workshops with industry stakeholders in 2001 to provide training in the effective development and maintenance of a web site.
b) Perform ongoing research to identify new sites eligible for participation in the TourNet program.
c) Communicate with existing and future sites for new opportunities and developments within the program.
d) Ensure links are added or updated on the TourNet site within seven days of notification.
e) Using the membership database, collect and store information on all TourNet participants.

2000/2001 OBJECTIVE:

II.22 Analyze and report on the effectiveness of on-line fulfillment by August 31, 2001. (Contact: Bonnie Baird and Clint Krismer)

Current Position:

In the spring of 2000, Tourism Saskatchewan, in partnership with other provincial organizations, placed a comprehensive guide to Saskatchewan events on the web. Tourism Saskatchewan plans to continue development of on-line listings throughout 2000 and 2001.

Strategy:

a) By September 30, 2000, place listings for outfitters participating with Tourism Saskatchewan on-line, and follow with other sectors throughout the winter of 2000/2001.
b) Develop a mechanism for tracking consumer activity in these listings, as well as on links to operator sites on TourNet.
c) Based upon a minimum of six months' activity, analyze and report on the effectiveness of on-line listings and adjust the development plan as required.

Goal: Develop an integrated community-based approach to product development in the Saskatchewan tourism industry that recognizes the inherent nature of the industry as a product that consumers experience rather than one they simply visit or consume, and ensure that this approach incorporates product development, human resource development and marketing.

2000/2001 OBJECTIVE:

II.23 Review the operations and strategic planning processes of Tourism Saskatchewan and the tourism regions to ensure that organizational and communications systems are in place so that an integrated strategic approach is possible, by September 30, 2001. (Contacts: Carol Lumb and Steve Pearce)

Current Position:

Tourism Saskatchewan provides service and support to the Saskatchewan tourism industry in the three key areas of product development, human resource development and marketing. However, shifts in the nature of tourism consumers and the industry itself demand a more integrated approach to service delivery. New tourism businesses without comprehensive human resource development plans and strategic marketing plans are destined to fail. An integrated approach to business development in the tourism industry will improve the viability of new businesses and ultimately their success rate.

Strategy:
a) Work with individuals from the tourism industry, Tourism Saskatchewan board members and key employees, and the board members and employees of the regions to identify where and how integration of service delivery can improve, by April 30, 2001.
b) Develop a concept for an organizational structure and communications system to facilitate this integration, by June 30, 2001.
c) Establish a framework for a strategic, integrated approach to tourism industry development in the 21st century, by September 30, 2001.

Goal: Raise awareness in the tourism industry of labour market conditions and their effect on business planning and operations.

2000/2001 OBJECTIVE:
II.24 Provide the tourism industry with information on current national and provincial labour market conditions, future trends, and implications for business management by September 30, 2001. (Contact: Tim Ouellette)

Current Position:
The tourism industry has a huge impact on the labour market. Nationally, 1.4 million people are employed in tourism-related jobs. The tourism industry is not, however, perceived as an employer of choice, nor is the existence of careers in tourism recognized. For this reason, tourism employment is a leading indicator of a shrinking labour pool. Dealing with a lack of available staff when business volumes rise is a challenge for any successful tourism operation. Tourism business operators have identified a need for a broader understanding of labour market and related issues, and need better skills and strategies to deal with such challenges in a long-term manner.

Strategy:
a) Drawing on currently available materials and studies, develop information regarding opportunities in tourism fields that relate to commonly-accepted career occupations, by December 31, 2000.
b) Write a series of articles relating the scope and impact of labour market conditions on the tourism industry, and circulate these in six industry newsletters by September 30, 2001.
c) Work towards altering the popular image of tourism-related occupations by encouraging media coverage of this information by September 30, 2001.

Goal: Ensure relevant, quality training programs, materials and resources are accessible to the industry across Saskatchewan.

2000/2001 OBJECTIVE:
II.25 Ensure coordination/delivery of tourism training to a minimum of 4,000 participants by September 30, 2001. (Contact: Diane Cohoon)

Current Position:
The demand for workshops and seminars on all facets of tourism business continues to grow within the tourism industry. Based upon industry requests, STEC has expanded its programming to meet this demand, often in partnership with other Tourism Education Councils, industry organizations and training/educational institutions.

Strategy:
a) Deliver *It's Good Business* workshops to a minimum of 1,200 people by September 30, 2001.
b) Deliver "Saskatchewan BEST" seminars to a minimum of 1,800 people by September 30, 2001.
c) Deliver a variety of workshops, based on industry demand, such as Introduction to Trade and Consumer Shows, Market Ready, Tourism Small Business Operator Skill Development Program, Volunteer Training, and the Positively Outrageous Service Series, to a minimum of 1,000 people by September 30, 2001.

2000/2001 OBJECTIVE:

II.26 Build on relationships with the Saskatchewan Indian Institute of Technology (SIIT), Dumont Technical Institute (DTI), the Saskatchewan Institute of Applied Science and Technology (SIAST), and the regional colleges, for delivery of the 13-week Train the Workplace Trainer as a regular extension program in a minimum of six communities by September 30, 2001.
(Contact: Tim Ouellette)

Current Position:

The Trade Advisory Board has included "Workplace Trainer" as a component of the necessary skills required to be recognized as a journeyperson in both Food and Beverage Person and Guest Services Representative apprenticeship programs. The successful implementation of the Workplace Trainer Program to develop effective supervisors and department heads, will play a pivotal role in the future of the industry.

Strategy:

a) On a quarterly basis, identify communities where apprentices and/or operators require the Train the Workplace Trainer program.
b) Assist the post secondary education partners in recruiting participants and facilitators for the classroom training, by September 30, 2001.
c) Provide opportunities for facilitator development and support as necessary, by September 30, 2001.

2000/2001 OBJECTIVE:

II.27 Working with sector organizations, deliver a minimum of eight Tourism Small Business Operator modules, in workshop format, to rural small and medium tourism businesses throughout the province by September 30, 2001.
(Contact: Tim Ouellette)

Current Position:

Tourism is an industry that is made up of approximately 80% small and medium-sized enterprises (SMEs). The Tourism Small Business Operator (TSBO) program was designed and developed to address the need for current operators, given their time limitations and dollar constraints, to have access to business skills programs that are responsive to their needs. The original omnibus program is proving to be too time-consuming and expensive; therefore, it is necessary to determine if the information can be made more accessible in a modular format.

Strategy:

a) Working with sector organizations, identify and customize TSBO modules of greatest interest to their members, by December 31, 2000.
b) Determine any funding support for delivery of the training, and jointly promote the workshops to membership through newsletters and fax/mail campaigns, by March 31, 2001.
c) Follow up with a minimum of 20% of participants between four and six weeks after the workshops for additional evaluative feedback, by September 30, 2001.

2000/2001 OBJECTIVE:

II.28 Ensure a minimum of 170 post-secondary school youth and 100 secondary school youth participate in the Tourism Careers for Youth (TCY) program and encourage a successful transition to available employment in the industry, by March 31, 2001. (Contact: Diane Cohoon)

Current Position:

A new three-year contract began in April 1999 for Phase III of the national CTHRC Tourism Careers for Youth Program. STEC's goal is to assist 500 unemployed youth and 200 graduating high school students in a successful transition from school to work by March 31, 2002. The delivery of the program is, in most cases, a partnership between Post Secondary Education and Skills Training (PSEST), the Can-Sask Career and Employment Centres, and STEC. STEC is currently working with First Nations and Metis groups for delivery of TCY in their communities.

To May 31, 2000, TCY programs have been delivered in Prince Albert, Regina, Saskatoon, Melfort, Moose Jaw and Yorkton. The program has recruited and interviewed approximately 300 applicants from across the province, and accepted 169 into the classroom. One hundred and forty-five participants have completed the classroom portion and made the transition to the workplace. STEC continues to sit on the national steering committee for program evaluation.

Strategy:
a) Communicate quarterly the availability of the TCY program to industry operators, Chambers of Commerce, CanSask Centres, etc. across Saskatchewan.
b) Determine sites, partners and participants for each scheduled TCY program, to meet year's target, by October 31, 2000.
c) Monitor all participants' progress through the in-class training, job search and on-the-job mentoring/training, and for a minimum of six months past the end of the training, by September 30, 2001.
d) Maintain records and statistics, prepare regular reports and submit as required to all partners, including the Canadian Tourism Human Resource Council and the Saskatchewan Department of Post Secondary Education and Skills Training, by May 31, 2001.
e) Participate nationally to identify any program delivery challenges, and contribute to and benefit from the experience of the other jurisdictions delivering TCY across Canada, by June 30, 2001.

2001/2002 OBJECTIVE:
II.29 Ensure a minimum of 700 participants have completed Tourism Careers for Youth training by the conclusion of TCY Phase III, March 31, 2002.
(Contact: Diane Cohoon)

Long Term Goal: Use the career awareness tools and training materials developed in TCY I, II and III for ongoing human resource development within the Saskatchewan tourism industry.

Goal: Partner with Aboriginal individuals and communities to provide relevant and useful tourism education and training products and services.

2000/2001 OBJECTIVE:
II.30 By September 30, 2001, pending available funding, utilize the services of an Aboriginal liaison to bridge STEC's programs, products and services more effectively with Aboriginal communities across Saskatchewan.
(Contact: Carol Lumb)

Current Position:
STEC remains an active member of the sub-committee of the Canadian Tourism Human Resource Council, working with Aboriginal Tourism Team Canada. The committee's intention is to adapt existing standards, training and certification programs to meet the needs of First Nations and Metis peoples within the tourism industry. For example, the Aboriginal Business Development Guide and an adapted version of the Heritage Interpreter workbook are now available.

Aboriginal youth make up more than 70.3% of our Tourism Careers for Youth participants, with good success rates for transition to employment. In addition, two projects were successfully completed in partnership with two Metis Locals.

Strategy:
a) Identify potential partners who may be able to assist STEC in funding an Aboriginal liaison, by October 31, 2000.
b) Work with the appropriate agencies to identify priorities and a work plan for implementation, by December 31, 2000.
c) Continue to ensure STEC identifies representatives within the Aboriginal communities in Saskatchewan when participants are required to review any nationally or regionally developed materials or programs.

2000/2001 OBJECTIVE:

II.31 Pilot-test a training process, in partnership with Aboriginal governments, communities, tourism industry operators, the Saskatchewan Indian Institute of Technology (SIIT), and the Apprenticeship Commission, to increase representation of Aboriginal peoples in the tourism workforce in Saskatchewan by September 30, 2001. (Contact: Tim Ouellette)

Current Position:

Current demographic studies show that all of the population growth will take place within First Nations communities. Aboriginal Participation in the Trades, a study undertaken by the Canadian Labour Force Development Board and the Canadian Council of Directors of Apprenticeship, has identified specific barriers that restrict Aboriginal participation in the trades. These barriers indicate that an essential component of participation is the development of community support for these programs.

Strategy:

a) Recruit participants, in partnership with the Tribal Councils in five communities, with an expectation of 60 participants in each trade by September 30, 2001.
b) Ensure national standards-based materials and resources are used in all programs, by September 30, 2001.
c) Identify and assist in the development of appropriate trainers as needed, by September 30, 2001.
d) Ensure that a minimum of 60 participants, who have identified Food and Beverage Person and Guest Services Representative as career choices, move forward into apprenticeship, by September 30, 2001.
e) Assist the successful participants from the first program to become workplace coaches and mentors for subsequent groups, by September 30, 2001.

Goal: Develop/revise standards, certification and tourism apprenticeship programs as directed by industry, while continuing to provide effective coordination of existing programs within Saskatchewan.

2000/2001 OBJECTIVE:

II.32 Register a minimum of 200 qualified certification candidates by September 30, 2001. (Contact: Lesley Welter)

Current Position:

Since tourism industry certification first became available in Saskatchewan in 1990, there has been steady growth in a number of areas:

- at least one new occupation has opened for certification each year (currently 24)
- the number of operations/properties involved in certification has increased each year (currently over 315), with good representation from urban and rural areas, as well as a good mix in sizes of properties participating
- record numbers of candidates have successfully completed certification within a year (between May 1, 1999 and May 1, 2000, 151 successfully completed certification)
- certification registrations have consistently numbered above the national average
- Saskatchewan has maintained the highest number of registrations per capita in Canada.

Strategy:

a) In consultation with all service areas of STEC and our partners, such as sector associations, determine priority occupations and timelines for marketing by October 31, 2000 and implement strategy by November 30, 2000.
b) Maintain number of properties receiving property recognition status at a minimum of 20 by September 30, 2001, and work closely with these properties to assist them in using the certification symbols in their marketing and public relations campaigns.

2001/2002 OBJECTIVE:

II.33 Register a minimum of 200 qualified certification candidates by September 30, 2002. (Contact: Lesley Welter)

2002/2003 OBJECTIVE:

II.34 Register a minimum of 200 qualified certification candidates by September 30, 2003. (Contact: Lesley Welter)

Goal: Continue to coordinate initiatives that actively promote tourism careers and tourism training opportunities across Saskatchewan.

2000/2001 OBJECTIVE:

II.35 Undertake a minimum of 15 activities that promote tourism careers to students, career changers, and career influencers, by September 30, 2001. (Contact: Carol Lumb)

Current Position:

It is important that STEC continue to reach Saskatchewan people, the media and government with positive messages about the career opportunities that the tourism industry offers to young people and career changers. The expected growth in tourism employment demands a proactive approach to promotion of the industry's varied careers, in order to minimize existing and potential skill shortages. STEC must ensure, throughout the year, that it takes every opportunity to highlight successful industry-driven and industry-supported initiatives.

Strategy:

a) Coordinate and host two PRIDE dinners, to recognize certified tourism professionals, and those who completed their apprenticeship programs, by June 30, 2001.
b) Coordinate and host a Property Recognition function to honour properties that have high levels of certification (50% certified and/or 80% enrolled) and Saskatchewan BEST workshops (60% management and front line participation), by December 31, 2000.
c) Advertise and promote the Tourism Careers for Youth program across Saskatchewan, by September 30, 2001.
d) Work with sector associations to print a minimum of six articles in newsletters on topics such as tourism apprenticeship programs, occupational certification, and career path success stories, etc. by September 30, 2001.
e) Provide career counseling and access to career information in the Resource Centre, by September 30, 2001.
f) Provide web site links to provincial and federal government career web sites where applicable, by October 31, 2000.
g) Implement the Tourism Work Web for Saskatchewan, once the current pilot test in B.C. and Nova Scotia is successfully completed, by September 30, 2001.

2000/2001 OBJECTIVE:

II.36 Continue towards a Saskatchewan Tourism Learning System by coordinating the work plan initiatives validated by the steering committee, by September 30, 2001. (Contact: Carol Lumb)

Current Position:

As tourism grows in importance in Saskatchewan, the need for more and well-coordinated tourism education and training programs will increase, both in the workplace and in the classroom. Over the past year, tourism programs in high schools continued to increase. SIAST is delivering the new certificate program in ecotourism, and a tourism management diploma program has been approved. Workplace-based training is also expanding across the industry.

With interest growing to expand existing offerings and to implement the new programs, the Tourism Learning System project is being strongly supported in Saskatchewan. This project is being coordinated by STEC, with direction and input from a steering committee toward an integrated approach from secondary and post secondary education and the tourism industry to ensure the development of a professional tourism workforce. This steering committee has validated a strategic plan and a work plan which are now being implemented.

Strategy:

a) Coordinate Saskatchewan's participation in a broadening of the core curriculum project nationally, by September 30, 2001.
b) Implement a prior learning assessment and recognition project between industry and at least one diploma program by September 30, 2001.
c) Implement the industry validation process, in partnership with education and training institutions, for all interested tourism programs by September 30, 2001.
d) Continue to implement the communications strategy to ensure all stakeholders are well informed of progress of the TLS and opportunities, by September 30, 2001.
e) Identify potential funding for continuation of the work of the TLS after the conclusion of the Tourism Standards Consortium Phase III project by March 31, 2001.

2000/2001 OBJECTIVE:

II.37 Increase awareness and usage of the Tourism Education and Training Resource Centre and its materials through a minimum of 12 activities by September 30, 2001. (Contact: Rochelle Emery-Luckett)

Current Position:

Usage and walk-in traffic are still limited for the resource centre. Many individuals in the tourism industry are unaware of the fact that STEC has an education and training resource centre, and of what it can do for them. However, those that have utilized it, have encouraged us to further develop this resource. Many are repeat visitors to the centre and access resources on a fairly regular basis.

Strategy:

a) Include a major article regarding the Resource Centre in a least one issue of *Going Places*, and use the Resource Centre as a tie-in with at least three other articles (e.g. ecotourism, customer service, etc.) by September 30, 2001.
b) Include at least four articles regarding the Resource Centre in industry newsletter(s) by September 30, 2001.
c) Speak with the Canada/Saskatchewan Business Service Centre, by October 31, 2000, to encourage referrals to the Resource Centre.
d) Hold at least one presentation for all of the tourism region managers, preferably including a tour of the Centre, by September 30, 2001.
e) Include tag lines on various fax-outs promoting the Resource Centre and its materials available for loan/rent, by September 30, 2001.
f) Update monthly the information on materials available for loan/rent on the STEC web site, by September 30, 2001.

2000/2001 OBJECTIVE:

II.38 Increase the sale of Resource Centre materials by 10% over 1999/2000 levels by September 30, 2001. (Contact: Rochelle Emery-Luckett)

Current Position:

As of March 31, 2000, the sale of materials has yielded good results through the implementation of the Resource Centre Marketing Plan. Analysis is now possible to determine which products can most effectively be marketed via certain promotional/sales efforts. It is intended to expand the current items being marketed through the resource centre, to include promotion of various workshops, seminars, etc. Cross-promotional opportunities with the STEC marketing coordinator and training department are being undertaken.

Strategy:

a) Update the Marketing and Communication Strategy for the Resource Centre for 2000/2001 using sales figures and feedback from the 1999/2000 Strategy, by October 31, 2000.
b) Continue to use and expand upon the method of fax marketing to promote sales of materials, by September 30, 2001.
c) Combine sales efforts with other STEC departments to utilize any mailouts or fax promotions, by September 30, 2001.

Goal: Induce investment into key tourism product sectors by entrepreneurs, non-profit associations, government agencies, and financial institutions.

2000/2001 OBJECTIVE:

II.39 By September 30, 2001, provide advisory services that improve the solvency of a minimum of 10 tourism operations, and facilitate increased investment in tourism products. (Contact: Ian McGilp)

Current Position:

Tourism Saskatchewan encourages tourism investment by providing advice and counselling to businesses, attractions, and public sector agencies with respect to planning, developing, and diversifying viable tourism products.

Strategy:

a) Continue to provide consultative assistance and to prioritize those opportunities that are responsive to emerging and growth markets for Saskatchewan.
b) Explore the potential for a joint "equity" mission with government departments and/or Crown corporations both to improve the effectiveness of these missions, and to generate foreign investment in Saskatchewan tourism ventures.
c) Explore the potential to establish a Foundation for Tourism Development to provide financial support to small and medium-sized enterprises in the ecotourism, agritourism, Aboriginal and heritage/cultural tourism sectors, and design program guidelines and criteria.

2001/2002 OBJECTIVE:

II.40 Participate in the preparation of a northern tourism strategy which will result in the development of the unique natural, cultural, and historical tourism assets of northern Saskatchewan by September 30, 2002. (Contact: Ian McGilp)

Goal: Provide Saskatchewan-specific business planning information to operators of tourism attractions and businesses.

2000/2001 OBJECTIVE:

II.41 Combine the Tourism Business Development Guide and Sources of Financing into one publication by December 31, 2000. (Contact: Ian McGilp)

Current Position:

The Business Development Guide was revised in July 1999, while the Sources of Financing booklet was updated in April 2000. Combining both publications in one format will provide a useful tool for industry planning and consultation.

Strategy:

a) Format the text, charts and illustrations.
b) In co-operation with representatives of sales and corporate development, seek sponsorships to cover the cost of publishing an attractive Tourism Development and Financing Guide.

2000/2001 OBJECTIVE:

II.42 Prepare a manual on construction of ecolodges in Saskatchewan by December 31, 2000. (Contact: Ian McGilp)

Current Position:

During December 1998, as part of the ecotourism initiative, it was decided that Tourism Saskatchewan would be responsible for writing a book that entrepreneurs could use as a guide for the construction of ecolodges.

Strategy:

a) Research construction technologies, options for building materials, and environmentally oriented mechanical equipment.
b) Visit, examine, and assess three demonstration projects in the Boreal Plain ecozone.
c) Review reports prepared for the SIAST Woodlands Campus Ecotourism Program in co-operation with the Ecotourism Society of Saskatchewan.
d) Prepare the text, and arrange for proofreading by Ecotourism Society members.
e) In co-operation with representatives of sales and corporate development, seek sponsorships to cover the cost of publishing an attractive Ecolodge Construction Manual.

Goal: Increase industry access to a varied line of Saskatchewan logoed merchandise at profitable prices for operators.

2000/2001 OBJECTIVE:

II.43 Through the sale of Saskatchewan logoed and other merchandise carried by Tourism Saskatchewan, achieve a 25% increase in gross revenue over 1998/99 by September 30, 2001. (Contact: Pam Parker)

Current Position:

To address the need for Saskatchewan branding, Tourism Saskatchewan first began to actively develop a line of Saskatchewan logoed merchandise in 1998 for sale in the visitor information centres and through wholesale purchase by operators and communities. Many small operators and small community visitor centres lack bulk purchasing capability; Tourism Saskatchewan can, therefore, fill the need to provide quality merchandise at reasonable prices for this sector.

Strategy:

a) Continue to develop a line of clothing and souvenir merchandise to carry the Saskatchewan logo at cost-effective prices.
b) Further develop and refine a catalogue for the promotion of merchandise for wholesale and retail purposes.
c) Develop an advertising strategy using print media, Internet and fulfillment inserts to promote the availability of merchandise to potential customers.

d) Develop a network of retail distribution outlets for Tourism Saskatchewan merchandise and provide a pricing structure that will also allow community VRCs and tourism industry stakeholders to benefit directly from the sale of this merchandise in their operations.
e) Evaluate and monitor the sales performance for all merchandise on an ongoing basis and make adjustments as required.
f) Continue to work with other partners to ensure that a full range of gift items is available for sale at the VRCs.

2001/2002 OBJECTIVE:

II.44 By September 30, 2002, based upon development of a Saskatchewan brand and in partnership with the Anniversaries Secretariat, begin the development of an official word-mark and merchandise line that will be used to market and commemorate Saskatchewan's centennial in 2005. (Contact: Pam Parker)

ENDS POLICY 3: GREATER PRODUCT DIVERSITY, INCLUDING OPPORTUNITIES FOR AUTHENTIC NATURAL, CULTURAL, AND HISTORICAL TOURISM EXPERIENCES.

Goal: Provide visitors to Saskatchewan with accurate, relevant and timely information on tourism products via relevant technologies and programs.

2000/2001 OBJECTIVE:

III.45 Implement hardware and software requirements to meet the comprehensive database needs for advertising and tourism promotion, research, and Internet-based fulfillment needs, and commence the first phases of consolidating existing databases with at least three product categories running on the web site by June 30, 2001.
(Contact: Clint Krismer)

Current Position:

Travellers are increasingly using the web to research and plan their trips. In order to meet this growing demand, Tourism Saskatchewan must develop the capability to provide customers with detailed, consumer-driven product information. The events database is running smoothly as part of phase one of this data consolidation and web delivery project.

Strategy:

a) Using the structure developed for delivery of the events information, modify and consolidate the existing outfitters database for integration into the new structure and delivery through the web site.
b) Identify a third product category and develop appropriate interfaces so that all three categories will merge into a newly-developed, common local front-end for use by Tourism Saskatchewan staff to manage, edit and update information.
c) Ensure that all updated information is available to visitors to the Tourism Saskatchewan web site with searchable functions to assist Internet visitors in locating the events or organizations that are of specific interest and relevance to meet their needs.

2001/2002 OBJECTIVE:

III.46 By June 30, 2002, complete consolidation of all relevant databases into the comprehensive database with all product categories running on the web site. (Contact: Clint Krismer and Tim Frass)

2001/2002 OBJECTIVE:

III.47 By September 30, 2002, commence pilot testing for Internet-based travel literature fulfillment and information inquiries. (Contact: Clint Krismer and Tim Frass)

2002/2003 OBJECTIVE:

III.48 By September 30, 2003, complete the implementation of a comprehensive Internet-based travel literature fulfillment and information-based inquiries system. (Contact: Clint Krismer and Tim Frass)

Goal: Continually evaluate and improve visitor services, effectively and accurately representing the diversity of tourism products in Saskatchewan.

2000/2001 OBJECTIVE:

III.49 Deliver enhanced customer service to visitors, by: ensuring 80% of toll-free calls are answered within 20 seconds; limiting abandonment call rates to no more than 5%; and maintaining an average inquiry response time of 14 days for printed travel literature fulfillment; with measurements performed monthly and averaged from October 1, 2000 to September 30, 2001. (Contact: Joan MacPhail)

Current Position:

Enhancements in Tourism Saskatchewan's telephone technology in the past year have now made it possible to obtain statistical data on callers on half-hour increments, and to allow callers to leave voice messages outside of operation hours. These changes increase the level of customer service delivered by the Call Centre and allow for operational efficiencies due to more accurate statistical information.

The tourism industry uses standards for the delivery of customer service in a Call Centre setting. One such standard is that 80% of toll-free calls are answered within 20 seconds of entering the telephone system. Running parallel to this standard is a second measurement where no more than 5% of callers will hang up before speaking with a Travel Counsellor (abandonment rate). There is a direct relationship with callers hanging up (abandoning) when they wait beyond the 20-second threshold to speak with someone.

A third component of excellence in customer service speaks to the delivery of printed materials to inquirers in a timely fashion. Tourism Saskatchewan uses a number of different mailing techniques to deliver material as quickly as possible in the most cost-effective manner. As customers shop and compare one travel destination to another, we must ensure that we do not lose the potential visitor because of unacceptable delivery delays.

Strategy:

a) Monitor staffing levels throughout the year by using information gathered from the Automatic Call Distributor to ensure adequate staffing coverage at peak times and to avoid overstaffing during slower periods.
b) Perform monthly checks of recipients of travel information packages to determine delivery times.
c) Use statistical data to determine, on a monthly basis, that 80% of calls are answered within 20 seconds and no more than 5% of callers abandon.
d) Share statistical information with Travel Counsellors to raise their level of awareness of the importance of this aspect of customer service.
e) Explore the potential of interactive web counselling by September 30, 2001.

2000/2001 OBJECTIVE:

III.50 Working with industry, explore ideas and options for delivering visitor services during the non-operational season of Tourism Saskatchewan's Visitor Reception Centres by December 31, 2000.
(Contact: Joan MacPhail)

Current Position:

At the December 1999 Tourism Saskatchewan Fall General Meeting, the need to explore options for delivery of visitor services during the non-operational season of the Visitor Reception Centres was identified. A meeting of interested parties was held in conjunction with the Spring General Meeting in April 2000, whereby further discussion identified this as an area important to the tourism industry.

Strategy:

a) Explore possibility of low frequency FM broadcast system.
b) Over the course of the year, convene or participate in at least three discussions with interested parties to review options.
c) Prepare a discussion paper by September 30, 2001 for review by industry stakeholders.

Goal: Assist stakeholders in the agritourism sector to develop new and/or enhanced market-ready product.

2000/2001 OBJECTIVE:

III.51 Continue to expand upon the prioritized recommendations of the agritourism strategy, ensuring the implementation of at least two of the recommendations by September 30, 2001.
(Contact: Ian McGilp)

Current Position:

The agritourism strategy recommended the holding of an agritourism conference, and the establishment of a "flagship consortium" of events, attractions, and agritourism businesses. Supported by Saskatchewan Agriculture and Food, members of the agritourism committee arranged to hold agritourism conference sessions in conjunction with the year 2000 Farm Progress Show in Regina. Planning is under way to hold an Agritourism Conference in Regina in December 2000.

Strategy:

a) Develop a system that recognizes and categorizes agritourism assets using the Ecotourism Society's "Horizons" program as a guide.
b) Utilizing the aforementioned system, assist committee members to establish a flagship consortium of events, attractions, and accommodation businesses.
c) Identify sources of financial support for agritourism initiatives, including external project management resources.

Goal: Expand Saskatchewan's network of accredited ecotourism attractions and businesses.

2000/2001 OBJECTIVE:

III.52 Assist the Ecotourism Society of Saskatchewan to continue implementation of the "Horizons" accreditation program, reaching a total of at least 15 accredited operations by September 30, 2001. (Contact: Ian McGilp)

Current Position:

Implementation of the "Horizons" ecotourism accreditation system commenced in April 2000. The Ecotourism Society of Saskatchewan is a non-profit society operated by volunteers, including outfitters, academics, biologists, and attraction managers. The organization has required the support of resource personnel from Tourism Saskatchewan. Adequate funding support for full program implementation will be required.

Strategy:

a) Assist tourism businesses to complete the accreditation process by evaluating their resources and capabilities, and providing guidance as they redefine their operations to respond to ecotourism markets.
b) Identify sources of financing for ecotourism initiatives, including external project management resources.
c) In co-operation with Tourism Saskatchewan's systems and technology branch, ensure that accredited ecotourism operations are adequately represented on the TourNet.
d) Advise the Ecotourism Society as required with respect to the planned Ecotourism Conference scheduled for October 2000.

Goal: Assist stakeholders in the cultural sector to develop new and/or enhanced market-ready product.

2000/2001 OBJECTIVE:

III.53 In partnership with SaskCulture, coordinate and host a symposium for cultural tourism by January 31, 2001. (Contact: Steve Pearce and Andrea Wagner)

Current Position:

A 1999 report of the President's Advisory Committee on Cultural Tourism recognized that a symposium would be an effective means to elevate awareness of the cultural product in Saskatchewan and to broker potential business opportunities with tourism stakeholders. In spring of 2000, discussions began with Tourism Saskatchewan and SaskCulture to plan and co-host the symposium for 2001 in conjunction with the advisory committee and the Department of Canadian Heritage.

Strategy:

a) Confirm agenda and program with all participants.
b) Develop a communications program to attract delegates from the cultural and tourism communities.
c) Confirm keynote and workshop speakers.
d) Complete symposium by January 31, 2001 and debrief planning committee by February 28, 2001.
e) Confirm need for a strategy on cultural tourism for Saskatchewan.
f) Confirm tasks, responsibilities and timelines as follow up to the symposium.
g) Encourage/facilitate opportunities for tourism regions to work with their cultural communities.

2001/2002 OBJECTIVE:

III.54 By September 30, 2002, work with SaskCulture and SaskSport Inc. to undertake an economic impact analysis of a minimum of five events in Saskatchewan. (Contact: Steve Pearce)

Long Term Goal: Pending availability of funds, work with cultural and tourism stakeholders to develop a terms of reference and complete a strategy for cultural tourism.

Goal: Expand the working relationship with the First Nations and the Metis Nation in order to facilitate and support the growth of Aboriginal tourism in the province.

2000/2001 OBJECTIVE:

III.55 By September 30, 2001, confirm a working liaison with the Federation of Saskatchewan Indian Nations in order to identify strategic priorities and ongoing opportunities for partnership with Tourism Saskatchewan and industry stakeholders.

Current Position:

Interest within the First Nations community for tourism development and promotion is continuing to grow. Opportunities must be addressed within the context of community impact, available resources, and commitment for ongoing development. Tourism Saskatchewan will develop an effective partnership with First Nations Tourism in order to help address these areas.

Strategy:

a) Confirm establishment of a First Nations tourism organization by FSIN.
b) Provide a formal orientation to the programs and services provided by Tourism Saskatchewan.
c) Assist in the identification of market opportunities for potential First Nations tourism products and packages.
d) Assess the feasibility of developing a certification process, based on Elders' teachings, to ensure that authentic products and services are available to visitors.
e) Agree to ongoing reporting relationship.

2000/2001 OBJECTIVE:

III.56 By September 30, 2001, confirm a working liaison with the Metis Nation of Saskatchewan in order to identify strategic priorities and ongoing opportunities for partnership with Tourism Saskatchewan and industry stakeholders.

Current Position:

Interest within the Metis Nation for tourism development and promotion is continuing to grow. The Metis Nation of Saskatchewan recently established Metis Tourism Inc. to accelerate the development of their tourism potential. Action plans covering key areas of the province and key Metis-related themes are in the final stages of preparation.

Strategy:

a) Establish a relationship with Metis Tourism Inc. to increase participation by Metis event, attraction and service providers in the established tourism infrastructure.
b) Provide a formal orientation to the programs and services provided by Tourism Saskatchewan.
c) Encourage the Southern, Central and Northern Metis Tourism Action Plan implementation committees to become actively involved with their respective tourism regions.
d) Assist in the identification of market opportunities for potential Metis tourism products and packages.

ENDS POLICY 4: A SASKATCHEWAN POPULATION KNOWLEDGEABLE AND SUPPORTIVE OF TOURISM.

Goal: Strengthen our linkages and relationships with other users and managers of Saskatchewan's natural resources in order to ensure more integrated and sustainable land and water resource use.

2000/2001 OBJECTIVE:

IV.57 Continue to integrate tourism resource values in the province's land use planning processes, contributing to at least three plans initiated by Saskatchewan Agriculture and Food, and two initiated by Saskatchewan Environment and Resource Management during 2001. (Contact: Ian McGilp)

Current Position:

Tourism Saskatchewan has played a prominent role in the preparation of several land use plans covering Crown land administered by Saskatchewan Agriculture and Food and Saskatchewan Environment and Resource Management. We have developed expertise, recognition, and respect among representatives of other industries and regulatory authorities. In addition, Tourism Saskatchewan is a member of the Provincial Parks Advisory Committee and the Minister's Forest Policy Advisory Committee.

Strategy:

a) Conduct a tourism resource inventory and analysis, and identify tourism issues for each of the land areas under consideration.
b) Participate in the development of objectives, strategies, and management policies that will identify permitted uses, restricted uses, and prohibited uses.
c) Write or contribute extensively to the tourism section of each plan.
d) Involve and consult industry representatives as frequently as possible.

Goal: Encourage Saskatchewan-based groups, committees and organizations that are operating fundraising or contesting opportunities to award Saskatchewan prize packages.

2000/2001 OBJECTIVE:

IV.58 Create a minimum of six Saskatchewan packages, to be used as prizing for in-province promotions by partner or non-partner companies by September 30, 2001. (Contact: Joe Chad)

Current Position:

In 1999/2000, Sales and Corporate Development brokered three industry prize packages for SaskTel's long distance promotion. Packages were supplied at no cost to SaskTel, who in turn provided advertising exposure to participating operators and Tourism Saskatchewan in several media, with an estimated value of $650,000. The campaign was a success for all involved. The opportunity exists to continue building such campaigns, allowing industry and Tourism Saskatchewan to take advantage of excellent in-province exposure at minimal cost, while at the same time building resident awareness of tourism opportunities.

Strategy:

a) Work with the regions and individual operators, using the results of the prize packages obtained and offered in SaskTel's promotion, to illustrate the advantages of packaging product, and to demonstrate the level of exposure that can be obtained at a low cost to contributors.
b) Create six prize packages by December 31, 2000.
c) Match prize offerings to promotions by March 31, 2001.

2000/2001 OBJECTIVE:

IV.59 Qualify out-of-province organizations, media or lotteries that could offer two Saskatchewan vacation packages as prizing for contests and/or promotions by September 30, 2001. (Contact: Joe Chad)

Current Position:

In the past two years, Sales and Corporate Development has negotiated prizing for promotions and contests within Saskatchewan, which have proven to be very successful and cost-effective in terms of gaining exposure for Saskatchewan's tourism product. There is an opportunity to gain similar exposure in key markets outside Saskatchewan, at minimal cost.

Strategy:

a) Create Saskatchewan getaway prize packages and match to specific contest.
b) Select key markets, establish contacts and ascertain the value of advertising programs surrounding contests.
c) Ensure that all participants receive maximum exposure in all contest advertising.

Goal: Inform Saskatchewan residents, media, government, and the business and corporate community about the activities of the Saskatchewan tourism industry and the benefits the industry brings to the province.

2000/2001 OBJECTIVE:

IV.60 Distribute a minimum of 15 news releases between October 1, 2000 and September 30, 2001, to heighten public and media awareness of the activities and accomplishments of the Saskatchewan tourism industry. (Contact: Patricia Alcorn)

Current Position:

Media interest in and reporting of news relating to the tourism industry has increased significantly over the past few years. It is important that Tourism Saskatchewan continue to work with the provincial media and to keep them informed, in a consistent and timely way, about happenings in the tourism industry.

Strategy:

a) Identify 15 key activities, accomplishments, etc. to be highlighted throughout the year and organize news conferences and/or distribute news releases to announce them.
b) Ensure the participation of the Minister of Economic and Co-operative Development, the Board of Directors of Tourism Saskatchewan, senior tourism officials and representatives of the tourism industry whenever possible.

2000/2001 OBJECTIVE:

IV.61 Maintain the participation of at least 10 Saskatchewan radio stations in carrying regular tourism radio reports between May 1 and September 30, 2000.
(Contact: Patricia Alcorn)

Current Position:

A number of Saskatchewan radio stations carry weekly tourism radio reports on Saskatchewan tourism products and events, provided and/or delivered by Tourism Saskatchewan staff. The reports are well-received by the stations and their audiences.

Strategy:

a) Contact various Saskatchewan radio stations to determine interest in continuing and/or beginning to air weekly tourism radio reports.
b) Gather information from tourism regions and operators to be included in the reports.

2000/2001 OBJECTIVE:

IV.62 By September 30, 2001, develop a strategy for including *Going Places*, news releases, and other pertinent information, such as Tourism Saskatchewan's Annual Report, on the Tourism Saskatchewan web site. (Contact: Patricia Alcorn)

Current Position:

Tourism Saskatchewan is enhancing its web site to include more and more information for visitors and members. Other audiences—for example, the media—are interested in accessing corporate information, such as annual reports and news releases, electronically. Having this capability would add to the effectiveness and timeliness of Tourism Saskatchewan's communications with its various stakeholders and audiences.

Strategy:
a) With the Manager of Systems and Technology, determine the equipment and training needed to place Tourism Saskatchewan publications and news releases on the web site.
b) Draft a strategy outlining timelines and financial and human resource requirements.

Goal: Demonstrate and communicate the ongoing impact of tourism on regional and local economies in Saskatchewan.

2000/2001 OBJECTIVE:
IV.63 Through ongoing communication vehicles, including constituency reports, provide information on tourism revenues and employment to provincial and municipal governments and officials by December 31, 2000.
(Contact: Bonnie Baird)

Current Position:
The importance of tourism as an economic sector needs to be regularly communicated on a provincial, regional and community basis. This requires that information obtained through Statistics Canada and other sources be adapted to be useful at a sub-provincial level.

Strategy:
a) Continue involvement with Canadian Travel Survey and International Travel Survey.
b) Continue to provide constituency information on tourism expenditures, visitation and employment.
c) Profile the economic importance of tourism through communication venues such as *Going Places*, tourism region newsletters and visitor and convention bureau newsletters.
d) Encourage tourism regions and cities to communicate the contributions of tourism as an economic sector.

Goal: Through Tourism Saskatchewan's image bank, promote the availability of quality Saskatchewan imagery to gain greater exposure for Saskatchewan's tourism product.

2001/2002 OBJECTIVE:
IV.64 By September 30, 2002, distribute a rate card and sample CD-ROM (or catalog) showcasing samples of the image bank collection to Saskatchewan government departments, print media, advertising agencies, and key businesses and organizations. (Contact: Patricia Alcorn)

Goal: Develop long-term, non-traditional partners and sponsors that will contribute to the ongoing success of the tourism industry through joint initiatives and demonstrations of public support, while creating a viable return on investment for the partner/sponsor.

2000/2001 OBJECTIVE:
IV.65 Enter into a minimum of one new non-traditional partnership resulting in a new joint initiative promoting an area of strength within Saskatchewan by September 30, 2001. (Contact: Barb Boyle)

Current Position:
Tourism Saskatchewan has 14 partners and four sponsors, each providing a variety of services, products, and benefits to the tourism industry. Joint initiatives with these partners/sponsors have been undertaken, including TD Bank's Visa Twin Cheque Contest, Labatt's Play A Round in Saskatchewan campaign, and SaskTel's Three-Way Calling and Long Distance promotions.

Strategy:
a) Research companies and alliances operating in Saskatchewan that fit at least three of these four criteria:
- Offer a member benefit
- Provide a benefit to tourism overall
- Enable Tourism Saskatchewan to market Saskatchewan more efficiently
- Improve the awareness and image of Saskatchewan and its tourism industry

b) Review opportunities for partnership with senior management from both organizations.
c) Confirm the relationship with a memo of understanding by September 30, 2001.

2000/2001 OBJECTIVE:
IV.66 Maintain the current level of support of non-traditional organizations for specific Tourism Saskatchewan initiatives or promotions, products or services, and/or sanctioned events through September 30, 2001. (Contact: Barb Boyle)

Current Position:
There are a number of organizations involved with Tourism Saskatchewan through the Tourism Awards of Excellence, Fall and Spring General Meetings, and Annual Golf Classic. Tourism Saskatchewan is seeking new ways to generate revenue and develop relationships.

Strategy:
a) By September 30, 2001, complete a formal briefing with each partner, reviewing activities, successes and challenges to date.
b) Confirm existing level of interest and support.
c) With senior management, review potential new areas of opportunity with each partner.
d) Consider the possibility of a strategic workshop with all partners.

Long-term Goal: Pursue partnerships with organizations involved in the areas of agritourism, Aboriginal tourism and ecotourism to assist in the growth of these emerging product areas.

Long-term Goal: Pursue partnerships and advertisers from organizations that may be able to provide increased national or provincial exposure or promotion, member benefits, and effective marketing opportunities for Saskatchewan, and that will enhance the public image of both Saskatchewan's tourism industry and its partners.

ENDS POLICY 5: EFFECTIVE SUPPORT STRUCTURES AND RELATIONSHIPS AMONG TOURISM INDUSTRY STAKEHOLDERS.

Goal: Create and sustain an effective partnership between Tourism Saskatchewan, Sask Sport Inc. and the Government of Saskatchewan's Anniversaries Secretariat through the Bid Saskatchewan initiative that will result in the shared use of existing resources to ensure the achievement of common goals.

2000/2001 OBJECTIVE:
V.67 Through Bid Saskatchewan, qualify and support event organizing committees to bid on and secure a minimum of five interprovincial, national or international events for Saskatchewan by September 30, 2001. (Contact: Margaret Duncombe, Bid Saskatchewan)

Current Position:
Bid Saskatchewan is a partnership between Tourism Saskatchewan, Sask Sport Inc. and the Government of Saskatchewan's Anniversaries Secretariat. The vision of Bid Saskatchewan is that sport, culture and recreation events will continue to grow, resulting in increased personal, social, economic and environmental benefits to the residents of Saskatchewan, leading up to and including the celebration of the Saskatchewan Centennial in 2005. Bid Saskatchewan will provide leadership and support to sport, culture and recreation organizations and to the tourism industry to increase the quality and quantity of events and to maximize the tourism potential of events.

Strategy:
a) Continue to qualify event organizers in the province and their capacity to attract and host new events.
b) Foster and facilitate strategic alliances between sport, culture and recreation organizations and the tourism industry in securing and in maximizing the tourism benefits of events.
c) Work with city, sectoral and regional organizations to coordinate efforts and identify new opportunities.
d) Continue to develop a methodology to quantify the economic impact of events on the province and the host community.
e) Support the organization and development of the 2001 Cultural Tourism Symposium and the Host at Home program.

Goal: Continue to develop the regional structure as identified in the Keeping P.A.C.E. report.

2000/2001 OBJECTIVE:
V.68 In consultation with the tourism regions, provide a minimum of two educational/training opportunities to each region and/or their industry members by September 30, 2001.
(Contact: Gene Lambert)

Current Position:
Members of Saskatchewan's tourism regions have indicated that they wish Tourism Saskatchewan's support to keep up to date with developments in the industry through training opportunities available through STEC or private industry programs.

Strategy:
a) Utilize semi-annual meetings with the regions, as well as board meetings and Tourism Saskatchewan's general meetings, as a means to identify educational and training opportunities.
b) Design and implement a questionnaire by September 30, 2001 to identify the greatest training needs of the regions.
c) Coordinate training opportunities available to regions, boards and members through STEC programs.

2001/2002 OBJECTIVE:
V.69 By September 30, 2002, explore, with the regions, the possibility of producing regional tourism guides consistent with the Saskatchewan brand and recognized as part of the Saskatchewan family of travel publications. (Contact: Gene Lambert)

2000/2001 OBJECTIVE:
V.70 Meet with each of the tourism regions to ensure they are familiar with STEC products, services and programs, to enable a strong link to their members and to address industry needs within each region, by December 31, 2000.
(Contact: Diane Cohoon)

Current Position:
STEC's tourism training needs assessment, An Investment in Growth, was released in 1999. The report contained a consistent theme that can be summarized as follows: "human resource practices in the tourism industry in Saskatchewan are less than outstanding. ... Workplace training practices must improve so that the industry can recruit and retain quality workers." Given that the tourism region staff are located strategically throughout the province, and given the expectation of their members for information, support and direction in tourism development, STEC should work closely with the tourism region staff to ensure available resources and programs are accessible to the industry across Saskatchewan.

Strategy:
a) Develop an orientation program for region staff, to ensure a good level of familiarity with the products and programs available through STEC and how best to implement them, by November 1, 2000.

b) Whenever possible, invite the staff of the regions to attend any workshop delivered within their region.
c) Introduce the needs assessment tools developed by the Tourism Standards Consortium, and provide region staff with the training and support to utilize the tools in their respective areas, by September 30, 2001.

Goal: Co-ordinate development initiatives with the new travel regions.

2000/2001 OBJECTIVE:
V.71 Consolidate and update the Northern Regional Tourism Destination Strategy by September 30, 2001. (Contact: Ian McGilp)

Current Position:
Destination strategies were prepared for nine travel regions between 1987 and 1993. Those regions have been consolidated into five new ones, and it is desirable for each to be equipped with an updated consolidation of relevant information pertaining to their new boundaries. It is expected that destination strategies for all five regions will be completed over the next five years.

Strategy:
a) Review the existing destination strategies as time permits, and prepare a standard outline and format.
b) Write the text and arrange for proofreading.
c) Consult with regional staff and representatives from attractions, businesses, and government agencies to ensure information is accurate and up to date.
d) Arrange for publication.

Goal: Assist communities in developing tourism planning capabilities.

2000/2001 OBJECTIVE:
V.72 Produce a Community Tourism Planning Guide by December 31, 2000. (Contact: Ian McGilp)

Current Position:
In many communities throughout Saskatchewan, tourism is recognized as an industry that can make a positive contribution to economic and social well being. In others, it is seen as a potential threat to traditional lifestyles and natural resources. In order to build upon the former and overcome the latter, it is desirable to provide community and business leaders with a guide they can follow in bringing together human and financial resources, to address tourism issues and opportunities locally.

Plans for the future include the expansion of the guide to include coordinated planning for the province's Centennial celebrations.

Strategy:
a) Review literature and write the text.
b) Review draft with community tourism committees and regional staff to ensure the material is sufficiently comprehensive.
c) In co-operation with sales and corporate development, seek sponsors to cover the cost of publishing an attractive Community Tourism Planning Guide.

Goal: Assist destination areas to identify potential linkages among attractions, services, events, and communities to more effectively address marketing and product development issues and opportunities.

2001/2002 OBJECTIVE:
V.73 Produce a Destination Area Planning Guide by September 30, 2002. (Contact: Ian McGilp)

Goal: Increase industry ownership in Tourism Saskatchewan, ensuring that members and stakeholders have direct access for input and involvement in the organizational operations of Tourism Saskatchewan through a variety of forums.

2000/2001 OBJECTIVE:
V.74 Implement the integrated membership program for the 2000 and 2001 calendar years. (Contact: Neil Sawatzky)

Current Position:
In June 1999, Tourism Saskatchewan's Board of Directors approved an integrated membership program for the 2000 and 2001 calendar years.

Strategy:
a) Work closely with the regional and DMO membership coordinators to ensure common understanding and application of the membership fee structure.
b) Develop a joint membership information package with the tourism regions, targetted to potential new members, that clearly explains the benefits available through the integrated membership plan.

2001/2002 OBJECTIVE:
V.75 Review the integrated membership program and ensure that any recommended changes are approved by the Board of Directors for implementation by September 30, 2002.
(Contact: Neil Sawatzky)

2000/2001 OBJECTIVE:
V.76 Increase the total membership in Tourism Saskatchewan to a level of 2,000 members by March 31, 2001.
(Contact: Neil Sawatzky)

Current Position:
Membership numbers have now reached more than 1,900. With growing interest in tourism and the establishment of the new regional structure, including the hiring of regional membership coordinators, it is expected that membership will continue to increase.

Strategy:
a) Continue to seek input and advice from the Membership Advisory Council regarding member benefits and services.
b) Work closely with regional and DMO membership coordinators to identify and convert potential members.
c) Continue to effectively communicate the benefits of membership through *Going Places*, relevant sales pamphlets, and the Membership Directory and Buyer's Guide.
d) Maintain a relevant benefits package, including a member/non-member pricing policy related to Tourism Saskatchewan events and services.

2000/2001 OBJECTIVE:
V.77 Provide a minimum of 20 opportunities at various locations throughout the province, that will afford tourism industry stakeholders direct access to senior management of Tourism Saskatchewan, for input into operational and marketing decision-making of the organization between October 1, 2000 and September 30, 2001. (Contact: Pam Parker)

Current Position:
In addition to regular, day-to-day business consultations, Tourism Saskatchewan provides a variety of opportunities (i.e. Board of Directors, advisory councils, town hall meetings, general meetings, marketing outlook forum, etc.) for direct access to Tourism Saskatchewan personnel and for input into the decision-making of the organization. Many within the industry, however, are unaware of these opportunities or the value of their attendance. It is also understood that operators have limited time and resources to dedicate away from their businesses to travel long distances to attend each event, such as general meetings, marketing outlook forums, etc. It is incumbent upon Tourism Saskatchewan to ensure that opportunities, whenever possible, are held as close to the operators as possible and that the effectiveness of each is monitored and evaluated.

Strategy:
a) Communicate Tourism Saskatchewan events to the industry through the use of an annual calendar printed in the Business Plan and, on an ongoing basis, through *Going Places* and fax cover sheets.
b) Design agendas for general membership meetings and conferences to meet the needs of the industry by ensuring that topics addressed are relevant and that adequate time is also allowed for networking.
c) Hold at least five Tourism Town Hall Meetings in locations where these meetings have not been held within the past two years.
d) Consider the combination of member events where possible.
e) Consider the price sensitivity/threshold, strategic timing and location of events to encourage attendance by stakeholders.
f) Monitor the effectiveness of each event and make adjustments on an annual basis. Changes will be made and communicated as required.

Goal: Continue to work with industry, traditional and non-traditional partners to increase the level of investment in Tourism Saskatchewan.

2000/2001 OBJECTIVE:
V.78 Generate a total of $221,000 in advertising revenue from the travel literature series by September 30, 2001. (Contact: Joe Chad)

Current Position:
Increased competition for advertising dollars and the introduction of 6% PST on advertising will influence the revenue potential of the travel literature series. However, increasing interest from non-traditional advertisers suggests new opportunities for investment.

Strategy:
a) Conduct small group meetings within each region, describing the benefits of and encouraging more co-operative advertising in the travel literature guides.
b) Create and distribute an advertising media kit that contains relevant data for decision-makers outside the tourism industry that will foster greater participation in the 2001 travel literature series.
c) Follow up by phone with all media kit recipients and qualify for potential sales opportunities.
d) Increase advertising revenue from new organizations, agencies and non-traditional advertisers in the 2001 travel literature series by 50% to $15,000.
e) Continue to monitor and coordinate day-to-day sales activity.

2000/2001 OBJECTIVE:
V.79 Introduce web advertising to the industry, with the intent of placing a minimum of 75 banner ads on the Tourism Saskatchewan web site by September 30, 2001. (Contact: Joe Chad)

Current Position:
Web-based advertising will be introduced to Saskatchewan tourism industry operators on a trial basis, since this is a relatively new medium for the industry.

Strategy:
a) Build a business case to assess the potential benefits for operators of Internet banner ads.
b) Qualify a diverse group of operators to participate in web advertising by September 30, 2000.
c) Measure and monitor advertisers' success to determine accurate value and revenue potential of this opportunity for 2002.

Long-term Goal: Ensure that Saskatchewan's tourism industry takes a proactive and influential role in the celebrations and legacy of Saskatchewan's Centennial.

PROFILE
OF A GROWING
ECONOMIC
SECTOR

11. AN EXCERPT FROM: TOURISM IN SASKATCHEWAN – PROFILE OF A GROWING ECONOMIC SECTOR

Prepared January 2000

1. OVERVIEW

1.1. The Definition of Tourism

1.1.1 Definition

The World Tourism Organization [1] and the United Nations Statistical Commission define tourism as "the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes."

The decision to travel is taken by the traveller (or an employer) and the expenditure on the trip is financed out of personal (or company) resources. In other words, the main purpose of the trip is not an activity for which the traveller will be remunerated from the place(s) to which the trip is made. For example, a conference participant who pays for himself is therefore a tourist while one who is paid for by the conference organizers is not a tourist.

Canada, through the Canadian Tourism Commission, Statistics Canada and the provincial tourism organizations, further refines this definition as a person travelling for purposes other than commuting to work or school who:

- Crosses an international border (excluding crews and military personnel); or
- Stays longer than 24 hours away from home; or
- Travels at least 80 kilometers from home if away less than 24 hours.

1.1.2. The Tourism Industry

Tourism supply describes the total production in Canada of the major commodities which are purchased by visitors and which are produced by tourism industries. Tourism supply is calculated by Statistics Canada National Accounts using portions of industries as defined in the standard industrial classification (SIC) system, through the Tourism Satellite Account Model.

1 The **World Tourism Organization** is the leading international organization in the field of travel and tourism. It serves as a global forum for tourism policy issues and a practical source of tourism expertise. Its membership includes 138 countries and territories and more than 350 Affiliate Members representing local government, tourism associations and private sector companies, including airlines, hotel groups and tour operators. With its headquarters in Madrid, WTO is an inter-governmental body entrusted by the United Nations with the promotion and development of tourism.

Only that portion of industry services consumed by visitors is included in the supply calculations. These industries are:

- Passenger transportation – air, rail, boat, bus and taxi
- Vehicle fuel, rental and repairs
- Accommodation
- Food and beverage services in restaurants, bars, taverns and nightclubs
- Food and beverages from grocery and liquor stores
- Recreation and entertainment services
- Travel agency services; and
- Specialty retail such as souvenir and gift stores.

In all expenditure allocations, passenger transportation costs accrue to the location of origin. For example, costs for air transportation for a visitor from Toronto to Regina accrue to Toronto, as that is where the expenditure is made.

1.1.3. The Key Benefits of Tourism

Tourism is the world's largest growth industry and shows no signs of slowing down in the 21st century. Global receipts from international tourism have increased by an average of 9% annually for the past 16 years to reach US $ 423 billion in 1996. During the same period, international arrivals rose by a yearly average of 4.6% to reach 594 million people in 1996.

The World Tourism Organization forecasts that international arrivals will top 700 million people by the end of the year 2000 and one billion by 2010. Likewise, earnings are predicted to grow to US $ 621 billion by the end of the year 2000 and US $ 1,550 billion by 2010.

1.1.3.1. Rural Opportunities

Tourism jobs and businesses are usually created in the most underdeveloped regions of a country, helping to equalize economic opportunities throughout a nation and providing an incentive for residents to remain in rural areas rather than move to overcrowded cities.

1.1.3.2. Export Earnings

International tourism is the world's largest export earner and an important factor in the balance of payments of many countries. Foreign currency receipts from international tourism reached US $ 423 billion in 1996, outstripping exports of petroleum products, motor vehicles, telecommunications equipment, textiles or any other product or service.

1.1.3.3. Employment

Travel and tourism is an important job creator, employing an estimated 100 million people around the world. The vast majority of tourism jobs are in small or medium-sized, family-owned enterprises. Research shows that job creation in tourism is growing 1.5 times faster than any other industrial sector.

1.1.3.4. Infrastructure Investment

Travel and tourism stimulates enormous investments in new infrastructure, most of which helps to improve the living conditions of local residents as well as tourists. Tourism development projects often include communications and technology, airports, roads, marinas, sewage systems, water treatment plants, restoration of cultural monuments and artifacts, museums and nature interpretation centres.

1.1.3.5. Tax Revenues

The tourism industry provides governments with hundreds of millions of dollars in tax revenues each year through accommodation and restaurant taxes, airport users' fees, sales taxes, property taxes, utilities, park entrance and camping fees, employee income tax and many other fiscal measures.

1.1.3.6. Gross Domestic Product (GDP)

International and domestic tourism combined generate up to 10% of the world's Gross Domestic Product (GDP) and a considerably higher share in many small nations and developing countries.

2. PROVINCIAL IMPACT

2.2 Tourism's Impact On Saskatchewan's Economy

Building on the province's key strengths with such world-class products as nature-based tourism, angling, Aboriginal and other cultural products, the tourism industry has seen real growth.

Beginning in 1995, market focus has shifted from traditional resident and nearby markets with little growth potential to more directly targeted potential consumers in Alberta, Ontario, British Columbia, U.S. Pacific, Southern and Eastern states, Europe and Asia. Tourism Saskatchewan also began to take advantage of emerging promotional opportunities on the Internet.

This more directed marketing has shown strong results, as evidenced in the increase in inquiries to Tourism Saskatchewan from 200,000 in 1994 to over 450,000 in 1999.

This increase in inquiries has also translated to real gains in tourism revenues within the province. Surveys conducted with potential consumers who have requested information from Tourism Saskatchewan show that return on investment from advertising-related visitation has almost tripled since 1990.

From 1994 to 1998, traveller expenditures within Saskatchewan grew from $942.4 million to $1.114 billion. Expenditures by non-resident visitors had the highest growth over this period, significantly contributing to Saskatchewan's export position. In fact, expenditures in Saskatchewan by United States residents and by other Canadians grew by over 50% and over 25% respectively.

Over this period, tourism has decreased its dependence on resident markets through growth in both visitation and revenues from export markets. Non-Saskatchewan residents' portion of overnight or longer trips increased from 31% to 34%, and the export portion of expenditures increased from 39% to 44%.

Tourism exports total more than those from lumber, natural gas or most manufactured goods, on an annual basis. Growth in tourism exports from 1994 to 1998, at 23.4%, outpaced manufacturing (19.4%), mining/oil/gas (-1.6%) and agricultural products (-3.9%), the other leading export industries.

Unlike many other industries, tourism impacts are spread throughout the province, with both visits and expenditures occurring in all regions.

While the contribution to the provincial GDP of many key industries, such as agriculture, mining and health services, decreased or remained static, tourism's contribution increased from 3% to 4% from 1996 to 1998.

While employment in Saskatchewan increased 3.7% from 1994 to 1997 (from 457,000 to 474,000 people), tourism-related employment increased 19.5% from 34,800 to 41,600. Tourism-specific employment (the jobs reliant entirely on tourism) increased 22.7% from 12,316 to 15,109 over the same period.

Tourism is one of the few industries that has an impact across a wide variety of occupation types and business sectors in all areas of the province.

Tourism revenues are equally important to both public and private enterprises. Provincial parks see an estimated 2.6 million visitors annually. Non-resident visitors to our parks play an increasingly important role in their viability. By 1999, over 23% of park visitor expenditures were export dollars generated by people from outside Saskatchewan and in certain parks, this ratio was as high as 60%.

Tourism enterprises total over 3,500 operations and events in Saskatchewan, including hotels, motels, resorts, outfitters, campgrounds, parks, museums, spas, casinos, tour operations, ecotourism operations, farm and ranch vacations, museums, golf courses, winter activity operations and other recreational facilities. This number does not include other tourism operations such as gas service stations, restaurants or public transportation.

Tourism Saskatchewan currently represents 1,806 of these operations, an increase of 80% from the 1,004 members that participated at the time of Tourism Saskatchewan's merger with TISASK in 1996.

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APPENDIX 1: TOURISM SASKATCHEWAN BOARD OF DIRECTORS' BIOGRAPHIES

Gary Atimoyoo is Director of Economic Development, a department within the Federation of Saskatchewan Indian Nations (FSIN), which he represents on Tourism Saskatchewan's Board. He has worked in various capacities with Indian Bands and organizations in Saskatchewan and Alberta over the past 20 years. Gary has also served on the Transition Team and is currently working with the First Nations of Saskatchewan to establish a First Nations Tourism Organization. An important component of his work with the Board is to ensure that the integrity of Indian culture and traditions is maintained in the tourism industry. Gary is a member of the Little Pine First Nation.

Kimberley Beaudry represents Tourism Regina on the Tourism Saskatchewan Board of Directors. She and her husband Duane own and operate Thrifty Car Rental in Saskatchewan. Kimberley is very active with the Thrifty business, as well as their four children. She's also an Adult Education Consultant specializing in Customer Service Facilitation. Kimberley has been a board member of Tourism Regina since 1993 and currently serves as Vice Chair, and is also Chair of Bid Regina, an entity which was formed in 1998.

Robert (Wayne) Elliott is the Northern Saskatchewan representative on Tourism Saskatchewan's Board of Directors. He is owner/operator of Overland Cross Country Lodge – a tourism outfitting business and campground located at Denare Beach – and of Elliott General Industries, a mechanical contracting firm. He is Past President of the Creighton branch of the Saskatchewan Wildlife Federation and the Denare Beach Community Club, and was a councillor on the Denare Beach Council. Wayne was a founding member of the Northern Neighbours Foundation, Visions North Community Futures Development Corporation and Creighton-Denare Beach Economic Development, where he was an active board member for eight years. He was a founding member of Northeast Tourism Inc., and its Chairperson for the last five years, and was the first Chairman of Northern Saskatchewan Tourism Inc. He is currently the northern representative of the Saskatchewan Snowmobile Association Board of Directors and the Saskatchewan representative on the Canadian Council of Snowmobile Associations Cross Canada Snowmobile Ride.

Wayne Fennig was elected at large to Tourism Saskatchewan's Board of Directors and is the Chair of the Board. He was a member of the Saskatchewan Tourism Authority Transition Team and a Founding Director of the Board. Wayne has 28 years of management experience, including 15 years as a Branch Manager of the North Battleford Western Development Museum. In addition, he is the Founding and current Chairman of the Battlefords Tourism and Convention Association; Founding Director, Past President and current Secretary-Treasurer of the Heart of Canada's Old Northwest Tourism Marketing Association Inc.; Past President of Prairie Employment Program Inc.; and Chairman of Tourism Saskatchewan's Industry Structure Implementation Committee. Wayne is currently a member of the North Battleford Rotary Club, the Battlefords Northwest Historical Society, the Museums Association of Saskatchewan, and the BUH Festival of Trees Committee.

Debbie Greening is the Vice Chair of the Board. She is the regional private sector representative for Saskatchewan/Manitoba on the CTC Board of Directors, and a member of the Transition Human Resources Committee of the CTC. Debbie is owner/operator of Land of the Loon Resort and is a partner in Shearwater Properties – Boat Cruises and Tourism Development. She is the Chairperson of the Ecotourism Council of Tourism Saskatchewan and a sitting member of the Northern Tourism Task Team for Saskatchewan Northern Affairs. Deeply involved in her community, she is a Past President of TISASK, President of the Lakeland Chamber of Commerce, Past Chair of the Saskatchewan Watchable Wildlife Association, Past President of the Ecotourism West Association, a past member of the Minister's Advisory Committee to the Superintendent, Prince Albert National Park, and past chair of the Northern Shores Tourism Region.

Garth Harris represents the Forest Regional Tourism Associations on Tourism Saskatchewan's Board of Directors. He has 20 years of "front-line" experience working for the Saskatchewan Liquor and Gaming Authority, and manages a store in Preeceville. Garth has a long history of volunteer activities at the regional, provincial and national levels. Locally, he is also involved with the Lions, snowmobile clubs, and community committees including Preeceville Tourism, Preeceville Sports Grounds, and Scouts Canada. Garth was one of the founding members of the Porcupine Forest Snowmobile Association in 1992. He is also the Chairperson for Kelsey Country, and Secretary-Treasurer for the Saskatchewan Snowmobile Association.

Peter Kingsmill is the founding Director of the Redberry Pelican Project (Canada) Foundation and the driving force behind the establishment of the Redberry Lake Biosphere Reserve. He is a principal in two boat-tour businesses in Saskatchewan, and works as a tourism development consultant and as Editor of *Communiqué*, the monthly magazine of the Canadian Tourism Commission. Over time, Peter has facilitated the development of Partners FOR the Saskatchewan River Basin and the Heart of Canada's Old Northwest Tourism Region. He is largely responsible for the development of an ecotourism accreditation system for the province, the first of its kind in Canada. He currently serves as Chair of the Working Group for Adventure Travel and Ecotourism for the Canadian Tourism Commission and is a member of the CTC's Product Development Committee, as well as an advisor to the Canadian Biosphere Reserves Association Tourism Consortium.

Darryl McCallum is the representative for the Metis Nation of Saskatchewan on the Board of Directors. He is the Tourism Coordinator for the Metis Nation of Saskatchewan and has over 20 years experience in the tourism sector. His previous involvement included posts at Tourism Saskatchewan as Manager of Product Development and the Aboriginal Waterways Project; Provincial Department of Economic Development as Director of Tourism Development, Manager of the Community Tourism Assistance Program, Leisure Travel Manager and Tourism Publications Coordinator. He has considerable experience in managing tourism financing programs, including the first Western Economic Partnership Agreement on Tourism, Destination Saskatchewan Programs, Community Tourism and Tourism Marketing Programs.

Orval McComb represents the Hotels Association of Saskatchewan on the Tourism Saskatchewan Board of Directors.

Jeremy Morgan first became involved with Tourism Saskatchewan as a member of the Transition Team and now represents the arts/heritage/multicultural community on the Board. He is the Executive Director of the Saskatchewan Arts Board. Prior to joining the Arts Board, Jeremy was the Executive Director of Wanuskewin Heritage Park Corporation and General Manager of Wanuskewin Indian Heritage Inc. Jeremy first became involved in the cultural sector in Nova Scotia, and came to Saskatchewan as General Manager of the Saskatchewan Council of Cultural Organizations. He is a member of the Citizens' Advisory Council on Anniversaries and serves on the Advisory Board of the University of Waterloo's Centre for Cultural Management. He also chairs the Minister's Interim Heritage Council.

Larry Spannier is Deputy Minister of Economic and Co-operative Development for the Government of Saskatchewan. Larry has worked for the provincial government for 22 years, since 1977 when he received a Bachelor of Administration from the University of Regina. He has held positions with various departments in that time, including Executive Council, Department of Labour, Department of Co-operatives, and the Employment Development Agency. Most recently he held positions as Senior Policy Analyst for the Policy Secretariat of Executive Council, and Executive Director and Assistant Deputy Minister of the Treasury Board Branch of the Department of Finance. Larry represents the Government of Saskatchewan on Tourism Saskatchewan's Board of Directors.

Ray Vangen is currently serving a two-year term with the Saskatchewan Southwest Tourism Association. He was active on the implementation committee of the Saskatchewan Tourism Authority and is currently serving on the Linkage with Owners Committee for the Tourism Saskatchewan Board. Ray strongly promotes small operators who are the grass roots and backbone of the tourism industry. He was appointed to the Board by the Prairie Regional Tourism Associations after serving a four-year term as Chairman with the old Horseshoe Region. Ray has been affiliated with tourism for the past seven years as owner/operator of Che-Ray Stables and Ranch Kitchen with his wife Cheryl. Ray is a self-employed drywall contractor, with 30 years of business experience.

Carole Wakabayashi represents Tourism Saskatoon on the Tourism Saskatchewan Board of Directors. She is currently Director of Corporate Development for the Western Development Museum. She previously held positions as Director of Marketing and Acting Director of Tourism Saskatoon, Education/Extension Officer and Manager of the Saskatoon branch of the WDM, Operations Manager at Prairieland Exhibition and lecturer for seven years at the University of Saskatchewan. Carole has been actively involved in the Saskatoon community for many years, serving on various boards such as the City Hospital Foundation, Saskatoon Family Service Bureau, YWCA, the 1989 Labatt Brier and Jeux Canada Games. She currently instructs the Marketing for Museums Certification course for the Museums Association of Saskatchewan.

Ed White represents the Saskatchewan Outfitters Association on the Tourism Saskatchewan Board of Directors.

APPENDIX 2: TOURISM ADVISORY COUNCILS AND TASK FORCES

EDUCATION AND TRAINING ADVISORY COUNCIL

Carol Lumb	Chair, STEC/Tourism Saskatchewan
Barrie Armstrong	Director, Saskatchewan Brew Pub Association
Lea Kennedy	Regina Exhibition Park
Jim Kilkenny	Delta Regina
Ernie Lipinski	Post-Secondary Education and Skills Training
Doug Muir	Saskatchewan Apprenticeship Commission
Jack Seel	Nutana Collegiate
Bruce Shepard	Diefenbaker Centre, U of S
Andy Veresh	Human Resources Development Canada

MARKETING ADVISORY COUNCIL

Stephen Pearce	Chair, Tourism Saskatchewan
Jan Desrosiers	Tourism Saskatoon
Mark England	West Central Tourism Region
Lynn Flury	Shearwater Properties Ltd.
Lorrie Gorenko	Southeast Tourism Region
Irene LeGatt	Canadian Heritage/Parks Canada
Erin Lightfoot	Southwest Tourism Region
Jan Olsen	Western Development Museum
Vance McNab	Saskatchewan Indian Gaming Authority
John Mielke	Northern Tourism Region
Mark Monsebroten	Northern Tourism Region
Lloyd Saul	East Central Tourism Region
Hal Stupnikoff	Saskatchewan Outfitters Association
Gerry Wenschlag	White Swan Lake Resort
Gayle Zimmerman	Tourism Regina

MEMBERSHIP ADVISORY COUNCIL

Neil Sawatzky	Chair, Tourism Saskatchewan
Betty Ann Calvert	Southwest Tourism Region
Trevor Forrest	Tourism Saskatoon
Randy Goulden	East Central Tourism Region
Darcee Nicholson	West Central Tourism Region
Sheri-Dawn Robinson	Tourism Regina
Paula Stalwick	Northern Tourism Region
Don Strelieff	Southeast Tourism Region

AGRITOURISM ACTION COMMITTEE

Ian McGilp	Chair, Tourism Saskatchewan
Kerry Holderness	Penny's Nature Lodge
Wayne Fennig	Western Development Museum
Wayne Gamble	Canadian Western Agribition
Jo Mader	Bluenose Country Vacation Farm
Tim McCashin	Motherwell Homestead National Historic site
Sherry Michalyca	Economic Development
Lorna Sylvestre	Sylvestre's Bed and Breakfast

PRESIDENT'S ECOTOURISM COMMITTEE

Debbie Greening	Committee Chair, Land of the Loon Resort
Gary Atimoyoo	Federation of Saskatchewan Indian Nations
Jim Bogard	Saskatchewan Northern Affairs
James Cook	Saskatchewan Agriculture and Food
Rick Driedeger	Horizons Unlimited Wilderness
Don Gillespie	Otter Basin Outfitters
Joe Hnatiuk	Ecotourism Society of Saskatchewan
Kerry Holderness	Quill Lakes Nature Tours
Peter Kingsmill	Redberry Pelican Project
Irene LeGatt	Parks Canada
Ken Lozinsky	Saskatchewan Environment and Resource Management
Bob MacFarlane	Ducks Unlimited
Ralph Nilson	University of Regina
Frank Roy	Nature Saskatchewan
Hal Stupnikoff	Saskatchewan Outfitters Association
Ian McGilp	Product Development, Tourism Saskatchewan

APPENDIX 3: TOURISM SASKATCHEWAN KEY CONTACTS

EXECUTIVE OFFICE

President/Chief Executive Officer — Fax: 787-2866
Roy Anderson — 787-2218
roy.anderson@sasktourism.com

Executive Assistant
Angela Johnson — 787-0754
angela.johnson@sasktourism.com

FINANCE & ADMINISTRATION

Director — Fax: 787-0715
Tim Frass — 787-1535
tim.frass@sasktourism.com

Manager, Accounting
Lois Schlosser — 787-5538
lois.schlosser@sasktourism.com

Manager, Systems & Technology
Clint Krismer — 787-5007
clint.krismer@sasktourism.com

COMMUNICATIONS

Director — Fax: 787-0715
Patricia Alcorn — 787-5488
trish.alcorn@sasktourism.com

Communications Assistant
Kate Blau — 787-2927
kate.blau@sasktourism.com

Graphic Designer
Julio Salazar — 787-9766
julio.salazar@sasktourism.com

Production Co-ordinator/Image Bank
Belva Schlosser — 787-9685
belva.schlosser@sasktourism.com

MARKETING & PRODUCT DEVELOPMENT

Vice President — Fax: 787-0715
Stephen Pearce — 787-9575
stephen.pearce@sasktourism.com

Product Development Consultant, Saskatoon
Ian McGilp — 933-5746
ian.mcgilp@sasktourism.com

Manager, Advertising & Publicity
Gerard Makuch — 787-2328
gerard.makuch@sasktourism.com

Media Publicity Co-ordinator
Nadine Howard — 787-3712
nadine.howard@sasktourism.com

Regional Consultant
Gene Lambert — 787-8708
gene.lambert@sasktourism.com

International Markets
Ted Hornung — 787-3016
ted.hornung@sasktourism.com

U.S.A. & Canadian Markets
Dodie Litowitz — 787-5282
dodie.litowitz@sasktourism.com

U.S.A. Markets
Kelly Brezinski — 787-2219
kelly.brezinski@sasktourism.com

Manager, Research
Bonnie Baird — 787-9556
bonnie.baird@sasktourism.com

SALES & CORPORATE DEVELOPMENT

Manager, Corporate Development Fax: 787-6293
Barb Boyle 787-9617
barb.boyle@sasktourism.com

Sales Manager, Regina
Joe Chad 787-2825
joe.chad@sasktourism.com

Sales Representative, Saskatoon
Wayne Watson 933-5903
wayne.watson@sasktourism.com

MEMBERSHIP & VISITOR SERVICES

Director Fax: 787-6293
Neil Sawatzky 787-2320
neil.sawatzky@sasktourism.com

Membership/Administrative Support
Lynn Kirk 787-5525
lynn.kirk@sasktourism.com

Events/Merchandising Manager
Pam Parker 787-2420
pam.parker@sasktourism.com

CALL CENTER

Fax: 787-5744
Local Inquiries: 787-2300
North American Inquiries: 1-877-2ESCAPE (237-2273)

Manager
Joan MacPhail 787-2473
joan.macphail@sasktourism.com

Bulk Distribution & VRC Co-ordinator
Nancy Rathgaber 787-9844
nancy.rathgaber@sasktourism.com

Senior Travel Counsellor
Maggie Fiorante 787-2321
maggie.fiorante@sasktourism.com

Information Collection Co-ordinator
Kathy Rosenkranz 787-2321
kathy.rosenkranz@sasktourism.com

SASKATCHEWAN TOURISM EDUCATION COUNCIL DIVISION

Fax: 933-6250
Local Inquiries: 933-5900

Director
Carol Lumb 933-5905
carol.lumb@sasktourism.com

Manager, Standards and Certification
Lesley Welter 933-5906
lesley.welter@sasktourism.com

Training Manager
Diane Cohoon 933-5908
diane.cohoon@sasktourism.com

Career Awareness Co-ordinator
Carol-Lynne Quintin 933-5912
carol-lynne.quintin@sasktourism.com

Apprenticeship Co-ordinator
Tim Ouellette 933-5913
tim.ouellette@sasktourism.com

Saskatchewan Best Co-ordinator
Dawn Martin 933-5907
dawn.martin@sasktourism.com

Resource Centre Co-ordinator
Rochelle Emery-Luckett 933-5910
rochelle.emery-luckett@sasktourism.com

Marketing/Sales Representative
Lois Kurp 933-5909
lois.kurp@sasktourism.com

OTHER KEY CONTACTS FOR 2000/2001 OBJECTIVES

Margaret Duncombe, Bid Saskatchewan 787-5458
margaret.duncombe@sk.sympatico.ca

Andrea Wagner, SaskCulture Inc. 780-9284
saskculture.info@saskculture.sk.ca

APPENDIX 4: ACRONYMS AND ABBREVIATIONS

AAA	American Automobile Association
ABA	American Bus Association
AGM	Annual General Meeting
CAA	Canadian Automobile Association
CARD	Canadian Advertising Rates and Data
CRS	Central Reservation Service
CTC	Canadian Tourism Commission
CTHRC	Canadian Tourism Human Resource Council
CTRI	Canadian Tourism Research Institute
CTS	Canadian Travel Survey
DMO	Destination Marketing Organization
FAM	Familiarization Tour
FIT	Foreign Independent Travel
FMCA	Family Motor Coach Association
FSIN	Federation of Saskatchewan Indian Nations
GIS	Geographical Information Systems
HAS	Hotels Association of Saskatchewan
HRDC	Human Resource Development Canada
MNS	Metis Nation of Saskatchewan
MTEC	Manitoba Tourism Education Council
NTA	National Tour Association
OMCA	Ontario Motor Coach Association
PRIDE	Professional Recognition by Industry for Development and Excellence
REDA	Regional Economic Development Authority
RV	Recreational Vehicle
SCVA	Saskatchewan Country Vacations Association
SERM	Saskatchewan Environment and Resource Management
SIAST	Saskatchewan Institute of Applied Science and Technology
SIIT	Saskatchewan Indian Institute of Technology
SOA	Saskatchewan Outfitters Association
STA	Saskatchewan Tourism Authority
STEC	Saskatchewan Tourism Education Council
STEP	Saskatchewan Trade and Export Partnership
TAWNC	Tourism Alliance for Western and Northern Canada
TCY	Tourism Careers for Youth
TEC	Tourism Education Council
TIAC	Tourism Industry Association of Canada
TISASK	Tourism Industry Association of Saskatchewan
TLS	Tourism Learning System
TSC	Tourism Standards Consortium
TTRA	Travel and Tourism Research Association
UN	United Nations
VFR	Visiting Friends and Relatives
VRC	Visitor Reception Centre
WTO	World Tourism Organization

APPENDIX 5: TOURISM SASKATCHEWAN 2000/2001 CALENDAR OF EVENTS

OCTOBER 2000

ECOTOURISM 2000 CONFERENCE	Oct. 23-24, Saskatoon

NOVEMBER 2000

Tourism Saskatchewan Board of Directors Meeting	TBA

DECEMBER 2000

Tourism Saskatchewan Fall General Meeting	Dec. 5, Regina
Tourism Saskatchewan Fall Conference	Dec. 5-6, Regina
Agritourism Conference (tentative)	
Tourism Saskatchewan Annual Report	*Released*
2001 Fishing and Hunting Guide	*Released*

JANUARY 2001

Tourism Saskatchewan Board of Directors Meeting	TBA
Cultural Tourism Conference	Jan. 18-20, Regina
2001 Official Road Map	*Released*
2001 Accommodation, Resort and Campground Guide	*Released*

FEBRUARY 2001

Tourism Saskatchewan Town Hall Meetings	TBA, various
2001 Saskatchewan Vacation Guide	*Released*

MARCH 2001

Saskatchewan Tourism Awards of Excellence Gala	March 16, Regina
Tourism Saskatchewan Board of Directors Meeting	TBA

APRIL 2001

Tourism Saskatchewan Spring General Meeting	TBA

MAY 2001

Visitor Reception Centres open	May 18, all locations
Tourism Saskatchewan Board of Directors Meeting	TBA

JUNE 2001

Saskatchewan Tourism Awareness Week	June 3-9
STEC Tourism PRIDE Dinner	June 4, Saskatoon
STEC Tourism PRIDE Dinner	June 5, Regina
Partnership Opportunities Catalogue	*Released*

AUGUST 2001

Tourism Saskatchewan Annual Golf Classic	TBA
Tourism Saskatchewan 2001-2004 Business and Strategic Marketing Plan	*Released*

SEPTEMBER 2001

Visitor Reception Centres close	Aug. 31, all locations
Tourism Saskatchewan Golf Classic – Final Round	TBA
Tourism Saskatchewan Board of Directors Meeting	TBA
Travel Literature Advertising Deadlines	Varied